Helsinki Human Resources application
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HR Service Management

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.

Explore
- **HR Service Management release notes**
- **Human Resources upgrade information**
- **Upgrade to Helsinki**
- **Human Resources overview**

Set up
- **HR implementation guide** on page 9
- **Activate HR Service Management** on page 20
- **Configure HR Service Management** on page 42

Administer
- **HR administration** on page 87

Use
- **HR Service Portal** on page 57
- **HR case management** on page 56
- **Create an HR case** on page 65
- **Approve an HR case** on page 69
- **Work on an HR case** on page 72
- **HR employee data management** on page 149
- **Create a new hire onboarding case** on page 157

Develop
- **Developer training**
- **Developer documentation**
- **Installed with HR Service Management** on page 21

Integrate
- **Workday integration**

Troubleshoot and get help
- **Knowledge management** on page 93
- **Use the HR knowledge base** on page 63
- **Search the HR knowledge base for known error articles**
- **Contact ServiceNow Support**

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.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Criteria</td>
<td>Way to select groupings of HR and System users based on criteria</td>
</tr>
<tr>
<td>HR Services</td>
<td>List of HR Services</td>
</tr>
<tr>
<td>HR Topic Categories</td>
<td>List of HR Service Topic Categories</td>
</tr>
<tr>
<td>HR Relationships</td>
<td>User relationships with each other</td>
</tr>
<tr>
<td>HR Positions</td>
<td>Positions available in company table</td>
</tr>
<tr>
<td>HR Assignment Tier Definition</td>
<td>Specifies escalation hierarchy</td>
</tr>
<tr>
<td>HR Group Roles</td>
<td>List of groups that have HR group roles</td>
</tr>
<tr>
<td>HR Email Scripts</td>
<td>List of all HR email scripts</td>
</tr>
<tr>
<td>HR User Roles</td>
<td>List of users who have HR user roles</td>
</tr>
<tr>
<td>HR Templates</td>
<td>Templates for Case record creation based on catalog item</td>
</tr>
<tr>
<td>Client Role Rules</td>
<td>Specifies the rules to generate client roles</td>
</tr>
<tr>
<td>HR Topic</td>
<td>DetailsList of HR Service Topic Details</td>
</tr>
<tr>
<td>HR Service Options</td>
<td>List of HR Services options that affect case creation</td>
</tr>
<tr>
<td>HR Departments</td>
<td>Departments available in company table</td>
</tr>
<tr>
<td>HR Locations</td>
<td>Locations available in company table</td>
</tr>
<tr>
<td>HR Chat Queues</td>
<td>List of HR chat queues</td>
</tr>
<tr>
<td>HR Surveys</td>
<td>Surveys used by HR application</td>
</tr>
<tr>
<td>HR Links</td>
<td>External links used by HR application</td>
</tr>
<tr>
<td>HR Properties</td>
<td>System properties used in HR Application</td>
</tr>
<tr>
<td>HR Email Templates</td>
<td>List of all HR-related email templates</td>
</tr>
<tr>
<td>HR Knowledge Bases</td>
<td>Knowledge bases used by HR application</td>
</tr>
<tr>
<td>HR Knowledge Articles</td>
<td>Knowledge articles used by HR application</td>
</tr>
<tr>
<td>HR Notifications</td>
<td>Email notifications used by HR application</td>
</tr>
<tr>
<td>HR Service Catalog Categories</td>
<td>Service catalog categories used by HR application</td>
</tr>
<tr>
<td>HR Service Catalog Items</td>
<td>Service catalog items used by HR application</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HR Document Templates</td>
<td>Document templates for document content used in HR application</td>
</tr>
<tr>
<td>HR Groups</td>
<td>Groups used by HR users</td>
</tr>
<tr>
<td>HR Skills</td>
<td>Skills available to company users</td>
</tr>
<tr>
<td>HR Roles</td>
<td>Roles used by HR users</td>
</tr>
<tr>
<td>HR Benefit Provider / Plans</td>
<td>Benefit providers and plans used by HR Benefits service</td>
</tr>
<tr>
<td>HR Benefit Type</td>
<td>Benefit types used by HR Benefits service</td>
</tr>
<tr>
<td>Disciplinary Issue Types</td>
<td>Disciplinary issue types used by HR Employee Relations service</td>
</tr>
<tr>
<td>Disciplinary Warning Types</td>
<td>Warning types used by HR Employee Relations service</td>
</tr>
<tr>
<td>HR System Report Frequencies</td>
<td>System Report Frequencies defined for HR Systems Service</td>
</tr>
<tr>
<td>HR System Report Types</td>
<td>HR System Report types used by HR System service</td>
</tr>
</tbody>
</table>

Human Resources getting started

As a member of the human resources (HR) organization, you interact with Human Resources 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 [HR Service Portal](#) on page 57.

**Specialist, generalist, agent**
Answer questions related to your area of expertise. Initiate and manage HR processes, such as onboarding a new employee.

**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.

**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 [Case management](#) on page 76.

**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 9.

HR implementation guide

To implement the Human Resources 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.

**HR project manager**

The project manager understands the department systems and processes, and will be responsible for the timeline, budget, communications, and so on.

**HR IT administrator**

This is typically someone who manages existing HR systems and who will manage the configuration of the Human Resources application.

**HR managers**

Managers who represent different HR functions, such as benefits, payroll, and employee relations.

**Other stakeholders**

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.

**Integration**

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.

If you use a different system, you may need to use professional services to help with integration.

**Process flow**

Decide whether to use state flows or workflows to drive the process for resolving HR cases.
HR knowledge bases  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.

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.

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.

Assignment of HR cases and tasks  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.

- How HR cases and tasks are assigned on page 13
- User groups installed with HR Service Management on page 25
- HR skills installed with HR Service Management on page 33
- HR Catalog items installed with HR Service Management on page 34
- Configure HR Service Management on page 42

Current HR processes  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.

Service level agreements (SLA)  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.

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 Ready 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 Human Resources 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.

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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>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR groups</td>
<td>Several <em>HR groups</em> are predefined, including HR, which is intended to contain all HR staff members.</td>
</tr>
</tbody>
</table>
Item | Description
---|---
HR case templates | 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 HR as the assignment group. 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.
Assignment rules | A predefined assignment rule assigns HR 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**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto-selection of agents will consider time zone for tasks</td>
<td>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.</td>
</tr>
<tr>
<td>Auto-selection of agents will consider location of agents.</td>
<td>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.</td>
</tr>
<tr>
<td>Auto-selection of agents for tasks requires them to have [all] [some] [none] skills</td>
<td>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 [all] [some] [none] based on whether you assign and maintain HR skills.</td>
</tr>
</tbody>
</table>

**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.
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.

**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.

**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.

**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.

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.
HR Service Management 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>
<thead>
<tr>
<th>#</th>
<th>Configure</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Enter or import the following information before importing user HR profiles.</td>
</tr>
<tr>
<td></td>
<td>• Positions</td>
</tr>
<tr>
<td></td>
<td>• HR Create a group. Include HR as a prefix in your group name so HR groups are easy to search for.</td>
</tr>
<tr>
<td></td>
<td>• Skills</td>
</tr>
<tr>
<td></td>
<td>Set configuration options.</td>
</tr>
<tr>
<td></td>
<td>Create or modify an HR profile on page 100 database, as determined during the decision phase.</td>
</tr>
<tr>
<td></td>
<td>Assign a role to a user to HR groups and staff. Be sure to assign hr_approver_user to anyone who approves cases.</td>
</tr>
<tr>
<td></td>
<td>Assign skills to HR groups and staff.</td>
</tr>
<tr>
<td></td>
<td>Create any HR templates you need for the HR catalog. These are for the additional processes you identified during the planning phase.</td>
</tr>
<tr>
<td></td>
<td>Review the installed HR case and task state flows and Customize a state flow as needed.</td>
</tr>
<tr>
<td>Note:</td>
<td>If you are managing cases manually or with workflows, you can disable state flows.</td>
</tr>
<tr>
<td></td>
<td>Review the installed HR Create a workflow and edit or create workflows as needed.</td>
</tr>
<tr>
<td></td>
<td>Review and configure Create an HR assignment rule on page 108.</td>
</tr>
<tr>
<td></td>
<td>Review and configure Notifications. You can customize the text of existing notifications and create notifications.</td>
</tr>
<tr>
<td></td>
<td>Review and configure HR Service Level Agreements (SLA).</td>
</tr>
</tbody>
</table>
Configure

Set up the HR knowledge bases. 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.

Human Resources roles

Roles used with the HR Service Management application

<table>
<thead>
<tr>
<th>Role title [name]</th>
<th>Description</th>
<th>Contains Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR specialist hr_specialist</td>
<td>Can create and update HR cases.</td>
<td>• hr_case_writer</td>
</tr>
<tr>
<td>HR generalist hr_generalist</td>
<td>Can create and update HR cases.</td>
<td>• hr_case_writer</td>
</tr>
<tr>
<td>HR recruiter hr_recruiting</td>
<td>Can create and update HR cases.</td>
<td>• hr_specialist</td>
</tr>
<tr>
<td>HR payroll specialist hr_payroll</td>
<td>Can create and update HR cases.</td>
<td>• hr_specialist</td>
</tr>
<tr>
<td>HR manager hr_manager</td>
<td>Full control over all HR functions.</td>
<td>• All hr_basic roles  • survey_admin  • hr_position_writer  • hr_profile_reader  • hr_case_reader  • hr_task_reader  • catalog_admin  • skill_admin</td>
</tr>
<tr>
<td>Director of HR hr_director</td>
<td>Full control over all HR functions.</td>
<td>• hr_manager</td>
</tr>
<tr>
<td>Assignment rule reviewer hr_assignment_reader</td>
<td>Can read HR assignment rules.</td>
<td>• None</td>
</tr>
<tr>
<td>Assignment rule updater hr_assignment_writer</td>
<td>Can update HR assignment rules.</td>
<td>• hr_assignment_writer</td>
</tr>
<tr>
<td>Role title [name]</td>
<td>Description</td>
<td>Contains Roles</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HR system administrator</td>
<td>Full control over all human resources data and can administer territories and skills.</td>
<td>• all HR roles&lt;br&gt;• territory_admin&lt;br&gt;• skill_model_admin&lt;br&gt;• survey_admin&lt;br&gt;• catalog_admin&lt;br&gt;• template_admin&lt;br&gt;• skill_admin&lt;br&gt;• knowledge_manager&lt;br&gt;• assignment_rule_admin&lt;br&gt;• model_manager</td>
</tr>
<tr>
<td>hr_admin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR agent</td>
<td>Can create, update, and delete HR cases.</td>
<td>• document_management_user&lt;br&gt;• hr_case_writer&lt;br&gt;• hr_kb_writer&lt;br&gt;• hr_profile_writer&lt;br&gt;• hr_task_writer&lt;br&gt;• skill_model_user&lt;br&gt;• skill_user&lt;br&gt;• survey_reader</td>
</tr>
<tr>
<td>hr_basic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR case reviewer</td>
<td>Can read HR cases and HR profiles.</td>
<td>• hr_read&lt;br&gt;• hr_profile_reader&lt;br&gt;• hr_task_reader</td>
</tr>
<tr>
<td>hr_case_reader</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR agent</td>
<td>Can read and create HR cases.</td>
<td>• hr_profile_reader</td>
</tr>
<tr>
<td>hr_read</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR case worker</td>
<td>Can create and update HR cases.</td>
<td>• hr_case_reader&lt;br&gt;• hr_task_writer</td>
</tr>
<tr>
<td>hr_case_writer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR approver</td>
<td>Can approve HR cases.</td>
<td>• approver_user</td>
</tr>
<tr>
<td>hr_approver_user</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR task reviewer</td>
<td>Can read HR tasks.</td>
<td>• None</td>
</tr>
<tr>
<td>hr_task_reader</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR task worker</td>
<td>Can create and update HR tasks.</td>
<td>• hr_task_reader</td>
</tr>
<tr>
<td>hr_task_writer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR profile reviewer</td>
<td>Can read HR profiles.</td>
<td>• None</td>
</tr>
<tr>
<td>hr_profile_reader</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR profile specialist</td>
<td>Can create and update HR profiles.</td>
<td>• hr_profile_reader</td>
</tr>
<tr>
<td>hr_profile_writer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role title [name]</td>
<td>Description</td>
<td>Contains Roles</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
<td>----------------</td>
</tr>
<tr>
<td>HR position specialist hr_position_writer</td>
<td>Can create, update, and delete HR position records.</td>
<td>• None</td>
</tr>
<tr>
<td>HR knowledge article writer hr_kb_writer</td>
<td>Can create and update HR knowledge articles.</td>
<td>• None</td>
</tr>
<tr>
<td>Content formatter [content_block_open_header_user]</td>
<td>Can edit the HR Portal header.</td>
<td>• None</td>
</tr>
</tbody>
</table>

Activate HR Service Management

HR Service Management is available as a separate subscription. The Human Resources Application: Core (com.snc.hr.core) plugin provides basic HR features, and there are several other plugins that are provided with the subscription.

Role required: admin

Activate each HR plugin that you want to use. Following is a list of each additional plugin and the features it provides.

- Human Resources Application: Service Portal (com.snc.hr.service_portal) activates the employee self-service HR Service Portal. HR Service Portal is the external portal used for recruiting and pre-employment activities. It is used to interact with new employees after they are hired and before they start.
- Human Resources Application: HR Connect (com.snc.hr.hr_connect) sets up an HR chat queue and makes it available on the HR Service Portal. Your organization must activate Connect.
- Human Resources Application: Workday Integration (com.snc.hr.wday) provides two-way integration with the Workday solution for your organization.
- Human Resources Application: Reporting Overview (com.glideapp.report.hr.overview) provides the Overview and Overview Reporting dashboards.

Human Resources Application: Performance Analytics plugin requires a subscription to Performance Analytics Premium. It provides HR performance analytics reports and lets you define HR performance analytics reports.

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.

Follow the steps to activate each HR plugin that you want to use.

1. Navigate to System Definition Plugins.
2. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.
   - If the plugin depends on other plugins, these plugins are listed along with their activation status.
   - If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.
4. 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 also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.

5. Click Activate.

Installed with HR Service Management

Several types of components are installed with HR Service Management.

The components installed with HR Service Management are:

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

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

Tables installed with HR Service Management

Human Resources Application: Core plugin adds the following tables.

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Case Model</td>
<td>The product models used for HR case record producers.</td>
</tr>
<tr>
<td>[cmdb_hr_case_product_model]</td>
<td></td>
</tr>
<tr>
<td>HR Task Model</td>
<td>The product models used for HR task record producers.</td>
</tr>
<tr>
<td>[cmdb_hr_task_product_model]</td>
<td></td>
</tr>
<tr>
<td>HR Assignment Data Lookup</td>
<td>The details of who HR cases can be assigned to.</td>
</tr>
<tr>
<td>[dl_hr_assignment]</td>
<td></td>
</tr>
<tr>
<td>HR Case</td>
<td>The details of a submitted HR case.</td>
</tr>
<tr>
<td>[hr_case]</td>
<td></td>
</tr>
<tr>
<td>HR Category</td>
<td>The categories that can be assigned to HR cases, used for assignment and reporting.</td>
</tr>
<tr>
<td>[hr_category]</td>
<td></td>
</tr>
<tr>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| HR Document Acknowledgement  
[hr_document_acknowledgement] | Record that a preboarding employee has signed an online document. |
| HR Document Template  
[hr_document_template] | Templates for generating HR documents as PDF files in HR cases. |
| HR Contact  
[hr_emergency_contact] | The name and contact information for emergency contacts. The details of emergency contacts, displayed in the hr_profile record for a sys_user. Contains a reference to Profile [hr_profile]. |
| 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]. |
| 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. |
| HR link  
[hr_link] | The details of HR links. |
| HR links for template lookup  
[hr_m2m_link_template_lookup] | The details of HR links for looking up templates. |
| HR todo tasks for template lookup  
[hr_m2m_task_template_lookup] | The details of to-do tasks for looking up templates. |
| Task templates  
[hr_template_lookup] | The details of looking up templates. |
| Content Block Open Header  
[content_block_open_header] | |
| Signature Image  
[signature_image] | Contains images of captured signatures. |
### Table 4: Tables for PDF generator

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Element</td>
<td>The formats used by the PDF generator that can be used to customize the template for the PDF document.</td>
</tr>
<tr>
<td>General List</td>
<td>A list of the properties and query used to generate the PDF document, for example, the employment verification letter.</td>
</tr>
</tbody>
</table>

### Roles installed with HR Service Management

Human Resources Application: Core plugin adds the following roles.

<table>
<thead>
<tr>
<th>Role title [name]</th>
<th>Description</th>
<th>Contains Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR specialist</td>
<td>Can create and update HR cases.</td>
<td>• hr_case_writer</td>
</tr>
<tr>
<td>hr_specialist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR generalist</td>
<td>Can create and update HR cases.</td>
<td>• hr_case_writer</td>
</tr>
<tr>
<td>hr_generalist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR recruiter</td>
<td>Can create and update HR cases.</td>
<td>• hr_specialist</td>
</tr>
<tr>
<td>hr_recruiting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR payroll specialist</td>
<td>Can create and update HR cases.</td>
<td>• hr_specialist</td>
</tr>
<tr>
<td>hr_payroll</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR manager</td>
<td>Full control over all HR functions.</td>
<td>• All hr_basic roles, survey_admin, hr_position_writer, hr_profile_reader, hr_case_reader, hr_task_reader, catalog_admin, skill_admin</td>
</tr>
<tr>
<td>hr_manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director of HR</td>
<td>Full control over all HR functions.</td>
<td>• hr_manager</td>
</tr>
<tr>
<td>hr_director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment rule reviewer</td>
<td>Can read HR assignment rules.</td>
<td>• None</td>
</tr>
<tr>
<td>hr_assignment_reader</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment rule updater</td>
<td>Can update HR assignment rules.</td>
<td>• hr_assignment_reader</td>
</tr>
<tr>
<td>hr_assignment_writer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role title [name]</td>
<td>Description</td>
<td>Contains Roles</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| HR system administrator hr_admin | Full control over all human resources data and can administer territories and skills. | • all HR roles  
• territory_admin  
• skill_model_admin  
• survey_admin  
• catalog_admin  
• template_admin  
• skill_admin  
• knowledge_manager  
• assignment_rule_admin  
• model_manager |
| HR agent hr_basic               | Can create, update, and delete HR cases.                                   | • document_management_user  
• hr_case_writer  
• hr_kb_writer  
• hr_profile_writer  
• hr_task_writer  
• skill_model_user  
• skill_user  
• survey_reader |
| HR case reviewer hr_case_reader | Can read HR cases and HR profiles.                                         | • hr_read  
• hr_profile_reader  
• hr_task_reader |
| HR agent hr_read                | Can read and create HR cases.                                               | • hr_profile_reader |
| HR case worker hr_case_writer   | Can create and update HR cases.                                             | • hr_case_reader  
• hr_task_writer |
<p>| HR approver hr_approver_user    | Can approve HR cases.                                                       | • approver_user |
| HR task reviewer hr_task_reader | Can read HR tasks.                                                          | • None |
| HR task worker hr_task_writer   | Can create and update HR tasks.                                             | • hr_task_reader |
| HR profile reviewer hr_profile_reader | Can read HR profiles.                                     | • None |
| HR profile specialist hr_profile_writer | Can create and update HR profiles.                                    | • hr_profile_reader |</p>
<table>
<thead>
<tr>
<th>Role title [name]</th>
<th>Description</th>
<th>Contains Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR position specialist hr_position_writer</td>
<td>Can create, update, and delete HR position records.</td>
<td>• None</td>
</tr>
<tr>
<td>HR knowledge article writer hr_kb_writer</td>
<td>Can create and update HR knowledge articles.</td>
<td>• None</td>
</tr>
<tr>
<td>Content formatter [content_block_open_header_user]</td>
<td>Can edit the HR Portal header.</td>
<td>• None</td>
</tr>
</tbody>
</table>

### User groups installed with HR Service Management

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

<table>
<thead>
<tr>
<th>User group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR</td>
<td>Parent to other HR groups. It grants the HR manager role, and its child groups inherit the HR manager role.</td>
</tr>
<tr>
<td>HR Benefits</td>
<td>Group members administer HR benefits. Inherits the HR manager role.</td>
</tr>
<tr>
<td>HR Employee Relations</td>
<td>Group members administer employee relations.</td>
</tr>
<tr>
<td>HR Investigations</td>
<td>Group members investigate HR cases. Inherits the HR manager role.</td>
</tr>
<tr>
<td>HR Leadership</td>
<td>Group members manage HR teams. Inherits the HR manager role.</td>
</tr>
<tr>
<td>HR Payroll</td>
<td>Group members administer HR payroll. Inherits the HR manager role.</td>
</tr>
<tr>
<td>HR Recruiting</td>
<td>Group members perform recruiting and hiring activities.</td>
</tr>
<tr>
<td>HR Systems</td>
<td>Group members grant system access, perform system password resets, create system reports, and provide HR Service Portal</td>
</tr>
<tr>
<td>HR VIP Watchlist</td>
<td>Members of this group are added to the watchlist of HR cases for VIP users.</td>
</tr>
</tbody>
</table>

### Script includes installed with HR Service Management

Human Resources Application: Core adds the following script includes.

<table>
<thead>
<tr>
<th>Script include</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GeneralHRForm</td>
<td>Implementation script for the HR employment verification letter.</td>
</tr>
<tr>
<td>hr</td>
<td>Container for commonly used values.</td>
</tr>
<tr>
<td>Script include</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>GenericHierarchyProcessor</td>
<td>Displays hierarchical data based on a parent child relationship.</td>
</tr>
<tr>
<td>hr_Case</td>
<td>Wrapper class for HR Case records.</td>
</tr>
<tr>
<td>hr_CaseAjax</td>
<td>Wrapper class for HR Case Ajax requests.</td>
</tr>
<tr>
<td>hr_Task</td>
<td>Wrapper class for HR Task.</td>
</tr>
<tr>
<td>hr_Profile</td>
<td>Wrapper class for HR Profile records.</td>
</tr>
<tr>
<td>hr_SysUser</td>
<td>Wrapper class for HR functionality on sys_user records.</td>
</tr>
<tr>
<td>hr_Utils</td>
<td>Generic functionality for the HR application.</td>
</tr>
<tr>
<td>hr_Configuration</td>
<td>Manages data reviewed by the HR Configuration option HR profile fields that users or managers can edit without HR approval</td>
</tr>
<tr>
<td>hrUserAuthentication</td>
<td>Verifies that users have access to documents that they are being asked to acknowledge.</td>
</tr>
<tr>
<td>hr_AssignmentRulesSecurityManager</td>
<td>Wrapper for Assigned Rules security.</td>
</tr>
<tr>
<td>hr_KnowledgeSecurityManager</td>
<td>Wrapper class for HR Knowledge Base articles security.</td>
</tr>
<tr>
<td>hr_KnowledgeM2MSecurityManager</td>
<td>Wrapper class for Attached Knowledge related list security on hr_case form.</td>
</tr>
<tr>
<td>hr_EmergencyContactSecurityManager</td>
<td>Wrapper class for HR Profile Emergency Contact security.</td>
</tr>
<tr>
<td>hr_EmploymentHistorySecurityManager</td>
<td>Wrapper class for HR Profile Employment History security.</td>
</tr>
<tr>
<td>hr_PositionSecurityManager</td>
<td>Wrapper class for HR Position security.</td>
</tr>
</tbody>
</table>

Client scripts installed with HR Service Management

Human Resources Application: Core adds the following client scripts.

<table>
<thead>
<tr>
<th>Client script</th>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reset priority on opened_for change</td>
<td>HR Case [hr_case]</td>
<td>When the user is a VIP, adjusts HR case priority.</td>
</tr>
<tr>
<td>Auto populate fields</td>
<td>HR Case [hr_case]</td>
<td>Automatically sets location and department fields in HR cases, based on details from the user associated with that record.</td>
</tr>
<tr>
<td>Populate profile and assignment group</td>
<td>HR Case [hr_case]</td>
<td>Populates the Assignment Group and HR profile fields (if the Opened for user has an HR profile) in an HR case.</td>
</tr>
<tr>
<td>Client script</td>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>--------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Custom Knowledge Search</td>
<td>HR Case [hr_case]</td>
<td>Custom knowledge search in the HR case form view.</td>
</tr>
<tr>
<td>End date must be after start date</td>
<td>HR Employment History [hr_employment_history]</td>
<td>Validates that the employment end date is not before the employment start date.</td>
</tr>
<tr>
<td>Enforce unique user</td>
<td>HR Profile [hr_profile]</td>
<td>Prevents creating a profile when the selected user already has an HR profile.</td>
</tr>
<tr>
<td>Hide Record Producer variables</td>
<td>HR Case [hr_case]</td>
<td>Hides record producer variables which would otherwise be displayed in the HR case form view.</td>
</tr>
<tr>
<td>Highlight VIP employee</td>
<td>HR Case [hr_case]</td>
<td>Formats an HR case for a VIP user in the HR case list.</td>
</tr>
<tr>
<td>Populate Category using template</td>
<td>HR Case [hr_case]</td>
<td>Populates the category based on the selected HR template.</td>
</tr>
<tr>
<td>Populate fields using sys_user</td>
<td>HR Profile [hr_profile]</td>
<td>Updates fields in a new HR profile record when an existing user is selected.</td>
</tr>
<tr>
<td>Populate HR profile onChange</td>
<td>HR Case [hr_case]</td>
<td>Updates the HR profile fields in an HR case automatically when the opened for user is changed.</td>
</tr>
<tr>
<td>Populate Opened for field onChange</td>
<td>HR Case [hr_case]</td>
<td>Updates the Opened for field when a profile is added to an HR case.</td>
</tr>
<tr>
<td>Populate template using category</td>
<td>HR Case [hr_case]</td>
<td>Populates the template on an HR case when a category is changed.</td>
</tr>
<tr>
<td>Start date must be before end date</td>
<td>HR Employment History [hr_employment_history]</td>
<td>Validates that the employment start date is not after the employment end date.</td>
</tr>
<tr>
<td>Field Access [onLoad]</td>
<td>hr_profile</td>
<td>Sets HR Profile fields to read only if the user does not have the hr_case_writer role.</td>
</tr>
<tr>
<td>update manager when department changes</td>
<td>hr_case</td>
<td>If the case is an Onboarding case, the Manager field is set when the Department field is updated.</td>
</tr>
<tr>
<td>Set Category</td>
<td>hr_document_template</td>
<td>Sets the default value for the Category field to Employment Verification.</td>
</tr>
<tr>
<td>Client script</td>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Clear task on change of user</td>
<td>hr_document_acknowledgement</td>
<td>When the user in the referenced task is changed, the document acknowledgement is cleared.</td>
</tr>
<tr>
<td>EnforceFields</td>
<td>hr_case</td>
<td>Ensures that the form cannot be submitted unless the mandatory fields are completed.</td>
</tr>
<tr>
<td>Populate Department from Position</td>
<td>hr_case</td>
<td>If the case is an Onboarding case and the Position field is updated, sets the Department field.</td>
</tr>
<tr>
<td>Validate Email Address on submit</td>
<td>hr_emergency_contact</td>
<td>Ensures that the email address is valid when the form is submitted.</td>
</tr>
<tr>
<td>Make Ack Type mandatory in HR Task.</td>
<td>hr_task</td>
<td>Make the Acknowledgement type field mandatory when assigned to an Opened for user on the HR case.</td>
</tr>
<tr>
<td>User field is only writable for hr_admin</td>
<td>hr_profile</td>
<td>User field on the hr_profile form is read-only for all the users except for hr_admin users.</td>
</tr>
</tbody>
</table>

Business rules installed with HR Service Management

Human Resources Application: Core adds the following business rules.

<table>
<thead>
<tr>
<th>Business rule</th>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned</td>
<td>HR Case [hr_case]</td>
<td>Invokes the state flow process for HR cases.</td>
</tr>
<tr>
<td>#Ready for work (approval off)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready for approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready for work (approval on)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#Start work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#Cancellation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accept</td>
<td>HR Task [hr_task]</td>
<td>Invokes the state flow process for HR tasks.</td>
</tr>
<tr>
<td>Assigned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#Cancel cleanup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready for work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reassign</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resume HR case</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business rule</td>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Add categories to scratchpad</td>
<td>HR Case [hr_case]</td>
<td>Loads the HR case types and associated categories and maps the template to the case type.</td>
</tr>
<tr>
<td>Add HR Supervisor to watch list</td>
<td>HR Case [hr_case]</td>
<td>Adds members of the HR VIP Watchlist group to an HR case when the user is a VIP.</td>
</tr>
<tr>
<td>#Add User Acceptance State</td>
<td>HR Case [hr_case]</td>
<td>Places an HR case into Waiting for user acceptance state.</td>
</tr>
<tr>
<td>#Auto-assessment business rule</td>
<td>HR Case [hr_case]</td>
<td>Triggers an HR survey when the case is closed or canceled.</td>
</tr>
<tr>
<td>#Clear durations</td>
<td>HR Case [hr_case]</td>
<td>Clears the Duration value on hr_case records when the case is reactivated (when Active changes to true on a record inserted or updated).</td>
</tr>
<tr>
<td>Close HR task</td>
<td>HR task [hr_task]</td>
<td>Closes the HR task that was created to request documentation from an employee when the employee replies to the email and attaches the file.</td>
</tr>
<tr>
<td>Display action required</td>
<td>HR Case [hr_case]</td>
<td>Displays HR has requested some actions on your part message.</td>
</tr>
<tr>
<td>Display Ready for Work message</td>
<td>HR Case [hr_case]</td>
<td>Displays a message if the HR case is in draft state instructing the agent to start work.</td>
</tr>
<tr>
<td>Display reminding message on HR case</td>
<td>HR Case [hr_case]</td>
<td>Checks the access level of the current user and displays appropriate information in the HR case. If the admin is impersonating a user, display a message that they are not allowed access.</td>
</tr>
<tr>
<td>Enforce unique user</td>
<td>HR Profile [hr_profile]</td>
<td>Ensures that a duplicate HR profile is not entered for a user.</td>
</tr>
<tr>
<td>Exit survey trigger</td>
<td>HR Task [hr_task]</td>
<td>Sends a link to the exit survey when the exit survey task state changes to Work in Progress.</td>
</tr>
<tr>
<td>Notify HR Case owner when all task close</td>
<td>HR Task [hr_task]</td>
<td>Sends a notification to the HR case assigned-to agent when all HR tasks are complete.</td>
</tr>
<tr>
<td>Populate case SLAs</td>
<td>Task SLA [task_sla]</td>
<td>Inserts a Service Level Agreement timer when an HR case is active.</td>
</tr>
<tr>
<td>Business rule</td>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reassignment counter for Case</td>
<td>HR Case [hr_case]</td>
<td>Counts the number of times the case is reassigned.</td>
</tr>
<tr>
<td>Remove HR Supervisor from watch list</td>
<td>HR Case [hr_case]</td>
<td>Removes HR VIP Watchlist group members from an HR case when the user is no longer a VIP.</td>
</tr>
<tr>
<td>Restrict query</td>
<td>HR Case [hr_case]</td>
<td>Amends the query used to get HR case records to display in list view.</td>
</tr>
<tr>
<td>Restrict query</td>
<td>HR Task [hr_task]</td>
<td>Amends the query used to get HR task records to display in list view.</td>
</tr>
<tr>
<td>Restrict query</td>
<td>Emergency Contact [hr_emergency_contact]</td>
<td>Amends the query used to get records to display in list view.</td>
</tr>
<tr>
<td>Restrict query</td>
<td>Employment History [hr_employment_history]</td>
<td>Amends the query used to get records to display in list view.</td>
</tr>
<tr>
<td>Send hr_case events</td>
<td>HR Case [hr_case]</td>
<td>Adds events to the event queue when records are inserted or updated.</td>
</tr>
<tr>
<td>Set HR mailto</td>
<td>System properties [sys_properties]</td>
<td>Sets the email address specified in the Configuration module when the user selects Email HR on the HR Portal.</td>
</tr>
<tr>
<td>Set user fields</td>
<td>HR Case [hr_case]</td>
<td>Sets the Opened for value on an hr_case record when the record is inserted or updated.</td>
</tr>
<tr>
<td>Start HR User Acceptance timer</td>
<td>HR Case [hr_case]</td>
<td>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.</td>
</tr>
<tr>
<td>#Synchronize fields to hr_profile</td>
<td>User [sys_user]</td>
<td>Synchronizes fields between associated hr_profile and sys_user records on update of the sys_user record.</td>
</tr>
<tr>
<td>#Synchronize fields to sys_user</td>
<td>HR Profile [hr_profile]</td>
<td>Synchronizes fields between associated sys_user and hr_profile records on update of the hr_profile record.</td>
</tr>
<tr>
<td>Update durations</td>
<td>HR Case [hr_case]</td>
<td>Sets the Duration value on hr_case records when the case becomes inactive (when Active changes to false on record inserted or updated).</td>
</tr>
<tr>
<td>Business rule</td>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>#Update HR Case percent complete</td>
<td>Task [task]</td>
<td>Updates the task percent complete for an HR case based on the state of associated HR tasks.</td>
</tr>
<tr>
<td>Update name field</td>
<td>HR Profile [hr_profile]</td>
<td>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.</td>
</tr>
<tr>
<td>#Validate end date is after start date</td>
<td>HR Profile [hr_profile]</td>
<td>Validates that Employment end date is after Employment start date when any of the two values changes when an hr_profile record is inserted or updated.</td>
</tr>
<tr>
<td>#Validate opened_for against hr_profile</td>
<td>HR Case [hr_case]</td>
<td>Updates the Opened for value on hr_case records when State is not Requested and the record is updated.</td>
</tr>
<tr>
<td>ValidateChanges</td>
<td>HR Task [hr_task]</td>
<td>Ensures that changes are valid.</td>
</tr>
<tr>
<td>#Verify Work Notes</td>
<td>HR Case [hr_case]</td>
<td>Requires that work notes are entered when the HR case state changes.</td>
</tr>
<tr>
<td>#Verify Work Notes</td>
<td>HR Task [hr_task]</td>
<td>Requires that work notes are entered when the HR task state changes.</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>Script action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Case opened</td>
<td>Sends an email to the caller and the user who enters the case when Active is true on record inserted.</td>
</tr>
<tr>
<td>HR Case created from email</td>
<td>Sends an email to the sender when an HR case is created from an inbound email action.</td>
</tr>
<tr>
<td>HR Case assigned to me</td>
<td>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.</td>
</tr>
<tr>
<td>HR Case assigned to my group</td>
<td>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.</td>
</tr>
<tr>
<td>Script action</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HR Case commented</td>
<td>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.</td>
</tr>
<tr>
<td>HR Case resumed</td>
<td>Sends an email to the assigned user when an HR task is closed complete and the HR case is automatically resumed.</td>
</tr>
<tr>
<td>HR Case changed</td>
<td>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.</td>
</tr>
<tr>
<td>HR Case worknoted</td>
<td>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.</td>
</tr>
<tr>
<td>HR Case closed</td>
<td>Sends an email to the creator, the caller, the assigned user, and members of the watchlist when Active is false AND On record updated.</td>
</tr>
<tr>
<td>HR Company welcome email</td>
<td>Sends an email to the HR profile manager on an event fired by the Employee Onboarding HR Workflow.</td>
</tr>
<tr>
<td>HR Task assigned to me</td>
<td>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.</td>
</tr>
<tr>
<td>HR Task assigned to my group</td>
<td>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.</td>
</tr>
<tr>
<td>HR Task commented</td>
<td>Sends an email to the assigned user, and members of the watchlist when Active is true AND Additional Comments changes AND On record updated.</td>
</tr>
<tr>
<td>HR Task closed</td>
<td>Sends an email to the user assigned to the HR case when Active is false AND On record updated.</td>
</tr>
<tr>
<td>HR Task changed</td>
<td>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.</td>
</tr>
<tr>
<td>HR Employment Verification</td>
<td>Sends an email to the third party who requested the employment verification letter.</td>
</tr>
</tbody>
</table>

Events installed with HR Service Management

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

**HR skills installed with HR Service Management**

Human Resources Application: Core adds the following HR skills.

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

**HR Catalog items installed with HR Service Management**

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

<table>
<thead>
<tr>
<th>HR catalog item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>401(k) benefits</td>
<td>Submit a question about 401(k) benefits. For example: How much can I contribute? or When will withdrawals start?</td>
</tr>
<tr>
<td>Career guidance</td>
<td>Submit a question about your career at the organization. For example: What is required to be considered for a promotion?</td>
</tr>
<tr>
<td>Employee information changes</td>
<td>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.</td>
</tr>
<tr>
<td>Employee offboarding</td>
<td>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.</td>
</tr>
<tr>
<td>Employee onboarding</td>
<td>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.</td>
</tr>
<tr>
<td>HR catalog item</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Employee relations questions</td>
<td>Submit a question about employee relations. For example: My office mate talks too loudly on the phone all day long.</td>
</tr>
<tr>
<td>Employment verification</td>
<td>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.</td>
</tr>
<tr>
<td>General</td>
<td>Submit a question about benefits that are not covered by the other catalog items. For example: Does the company have a discount program?</td>
</tr>
<tr>
<td>Grievance</td>
<td>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.</td>
</tr>
<tr>
<td>Leave of absence</td>
<td>Submit a request for a leave of absence. Variables include the type of leave and when it starts and ends.</td>
</tr>
<tr>
<td>Life events</td>
<td>Submit a question about life events such as marriage or domestic partnership.</td>
</tr>
<tr>
<td>Medical/dental/vision</td>
<td>Submit a question about your health coverages, such as what you need to do to cover your domestic partner.</td>
</tr>
<tr>
<td>Payroll</td>
<td>Submit a question about payroll. For example: How do I change my W2 deductions?</td>
</tr>
<tr>
<td>Retirement</td>
<td>Submit a question about retirement benefits and options, such as how many years must you have with the company to qualify for retirement.</td>
</tr>
<tr>
<td>Tuition</td>
<td>Submit a request for tuition reimbursement following your company guidelines. Variables include the educational institution, class taken, completion date, and the tuition amount.</td>
</tr>
<tr>
<td>Vacation</td>
<td>Submit a question about vacation policies, such as when you get an additional week per year.</td>
</tr>
</tbody>
</table>

**Installed with HR Connect**

Several types of components are installed with Human Resources Application: Connect.

**Client scripts installed with HR Self Registration**

Human Resources Application: Self Registration adds the following client scripts.
<table>
<thead>
<tr>
<th>Client script</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validate email address</td>
<td>Ensures that the registrant has entered a valid email address. If it is invalid a message appears.</td>
</tr>
</tbody>
</table>

### Business rules installed with HR Self Registration

Human Resources Application: Self Registration adds the following business rules.

<table>
<thead>
<tr>
<th>Business rule</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validate HR registration</td>
<td>Ensures that duplicate registrations or user records are not created.</td>
</tr>
<tr>
<td>Display request message</td>
<td>Shows a message indicating that the request of the registration is being processed.</td>
</tr>
</tbody>
</table>

### Email notifications installed with HR Self Registration

Human Resources Application: Self Registration uses the following email notifications. All are based on the HR Registration Request [hr_registration_request] table.

<table>
<thead>
<tr>
<th>Script action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Registration Processed</td>
<td>Sends an email to the registrant with their Candidate Portal login credentials.</td>
</tr>
<tr>
<td>HR Registration Rejected</td>
<td>Sends an email to the registrant to notify them that their registration was rejected.</td>
</tr>
</tbody>
</table>

### Installed with HR Workday Integration

Several types of components are installed with Human Resources Application: Workday Integration. Demo data is available.

Human Resources Application: Workday plugin adds the following tables.

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>[sn_hr_wday_hr_cmn_department_int]</td>
<td>Workday interface table for departments.</td>
</tr>
<tr>
<td>Workday HR CMN Location Interface</td>
<td>Workday interface table for location.</td>
</tr>
<tr>
<td>[sn_hr_wday_hr_cmn_location_int]</td>
<td></td>
</tr>
<tr>
<td>Workday HR Job Profile</td>
<td>Job profile data (code, level, position).</td>
</tr>
<tr>
<td>[sn_hr_wday_hr_job_profile]</td>
<td></td>
</tr>
<tr>
<td>Workday HR Job Profile Interface</td>
<td>Workday interface table for job profile.</td>
</tr>
<tr>
<td>[sn_hr_wday_hr_job_profile_int]</td>
<td></td>
</tr>
</tbody>
</table>
### Signature Pad

Signature Pad is a feature that any application can use. It captures an electronic signature that can be associated with a document or a task.

The HR Service Management application uses signature pad with onboarding documents like offer letters, background check approval, company policy acknowledgements, and more.

The Human Resources Application: Core [com.snc.hr.core] plugin activates the Signature Pad [com.snc.signaturepad] plugin. The Signature Image [signature_image] table installs with this plugin. Ensure True is the value in the com.snc.signaturepad.retrieveSignature field System Properties.

#### Use

You can send your employees documents that require a user verification such as a digital signature or by typing their name.

When signature pad is associated with a document or a task, it captures the drawn signature as an image and stores it in the Signature Image [signature_image] table.

**Note:** Typing a signature provides acknowledgement, but does not capture an image that is stored.

For HR document templates, use the Insert Signature button to insert a variable that prompts a user to sign the document. For HR PDF document templates, use the Employee Signature field name and PDF Template Mappings to prompt a user to sign the document. Refer to *HR PDF document templates* on page 123.

**Note:** Check the generate document UI action condition to ensure this feature works correctly.

#### Examples

The HR Delivery System uses PDF documents for various scenarios. An example of the code used to call a UI page or dialog...
box for the signature

pad:
An example of the code used in a document after a signature has been accepted and a
Activate the Signature Pad plugin

To activate signature pad in your application, install the com.snc.signaturepad plugin. The signature_image table installs with this 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. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.
   - If the plugin depends on other plugins, these plugins are listed along with their activation status.
   - If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.
4. 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 also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.
5. Click Activate.

Test signature pad

After you have activated the Signature Pad plugin, you can try it.

1. Navigate to System UI UI Pages accept_signature.
2. Scroll down and click Try It.
   - You can type your signature.
3. In the Print your name field, type your name.
4. Click Accept. A record is inserted in the signature_image table.
5. To draw your signature, select the Draw it tab.
6. Use your mouse to draw your signature.
7. Click Accept. A record is inserted in the signature_image table.

Activate HR Performance Analytics

The Human Resources Performance Analytics plugin can be activated after you purchase subscriptions to HR Service Management 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. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.
   - If the plugin depends on other plugins, these plugins are listed along with their activation status.
   - If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.
4. 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 also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.
5. 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>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakdown [pa_breakdown]</td>
<td>Breakdown definitions.</td>
</tr>
<tr>
<td>Bucket [pa_bucket]</td>
<td>Definition of buckets belonging to bucket group</td>
</tr>
<tr>
<td>Bucket group [pa_bucket_groups]</td>
<td>Bucket group definition.</td>
</tr>
<tr>
<td>Indicator Source [pa_cubes]</td>
<td>Configuration of source (table) and conditions (filter) for the indicator.</td>
</tr>
<tr>
<td>Breakdown Source [pa_dimensions]</td>
<td>Configuration of source (table) and conditions (filter) for the breakdown.</td>
</tr>
<tr>
<td>Indicator [pa_indicators]</td>
<td>List of indicators configured.</td>
</tr>
</tbody>
</table>
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 HR - Administration 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 life cycle, 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Dependency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lifecycle</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment method for requests</td>
<td>Select the method for assigning requests.</td>
<td>• Automate state flows on the Human Resources tab is enabled.</td>
</tr>
<tr>
<td></td>
<td>• using auto-assignment: Requests are automatically assigned.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• using a workflow: Select the assignment workflow.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• manually: Manually assign requests.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The assigned state was removed from the base system. When you have</td>
<td></td>
</tr>
<tr>
<td></td>
<td>customizations that use the assigned state, import it into your current</td>
<td></td>
</tr>
<tr>
<td></td>
<td>version. Go to your previous instance, copy your custom assigned state</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(export to XML), and import it to your current instance.</td>
<td></td>
</tr>
<tr>
<td>Use this workflow to assign</td>
<td>Select the workflow for assigning requests.</td>
<td>• Automate state flows on the Human Resources tab is enabled.</td>
</tr>
<tr>
<td>requests</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Dependency</th>
</tr>
</thead>
</table>
| Assignment method for tasks              | Select the method for assigning tasks:  
  • using auto-assignment: Tasks are automatically assigned.  
  • using a workflow: You are prompted to select the workflow you want to use for assignment.  
  • manually: Manually assign tasks.                                                                                                                   | • Automate state flows on the Human Resources tab is enabled.                                 |
| Use this workflow to assign tasks         | Select the workflow for assigning tasks.                                                                                                                                                                    | • Automate state flows on the Human Resources tab is enabled.                                 |
| 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. | • Automate state flows on the Human Resources tab is enabled.                                 |
| Catalog and Request Creation             |                                                                                                                                                                                                              |                                                                                                                                                         |
| 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 allow automatic publishing of catalog items for the application.                                                                                                                      |                                                                                                                                                         |
| Notification                              |                                                                                                                                                                                                              |
## Lifecycle

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Dependency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table</td>
<td>Set up notifications for changes to HR cases or tasks.</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>• Table: Select whether this notification is sent for a change to the Request or the Task table.</td>
<td></td>
</tr>
<tr>
<td>Recipients</td>
<td>• Field: Select the field that must change for the notification to be triggered.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Recipients: Select the recipients of the notification. If you select a specific user or a specific group, you are prompted to select a user or group.</td>
<td></td>
</tr>
</tbody>
</table>

Enter as many notifications as you need. To remove a notification, click the delete (-) icon on the right.

3. Click the Assignment tab and select configurations.

### Table 6: Assignment tab options

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Dependency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual Assignment</td>
<td>Assign requests or tasks based on assignment group coverage areas</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enable to limit the selection of groups from the Dispatch group and Assignment group fields to groups that cover the location of the task.</td>
<td></td>
</tr>
<tr>
<td>Auto-Assignment / Scheduling</td>
<td>Auto-selection of agents will consider time zone for tasks</td>
<td>• Automate state flows on the Human Resources tab is enabled.</td>
</tr>
<tr>
<td></td>
<td>Enable this option to consider the time zone of the agent when assigning a task</td>
<td></td>
</tr>
</tbody>
</table>

Additional Factors
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Dependency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manual Assignment</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 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. | - Automate state flows on the Human Resources tab is enabled.  
- Assignment method for requests: using auto-assignment  
- Assignment method for tasks: using auto-assignment |
| | | |
| Auto-selection of agents for tasks requires them to have skills | This option determines the degree to which skills must be matched to a task when determining auto-assignment.  
- Select all to require that an assigned agent has all the skills to perform the task. An agent who lacks one skill is eliminated.  
- Select some if you want agents who have most of the skills to perform the task.  
- Select none to auto-assign agents without the required skills. | - Automate state flows on the Human Resources tab is enabled.  
- Assignment method for requests: using auto-assignment  
- Assignment method for tasks: using auto-assignment |
| 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. | - Automate state flows on the Human Resources tab is enabled.  
- Assignment method for requests: using auto-assignment  
- Assignment method for tasks: using auto-assignment |

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Dependency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Documentation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enable a dedicated knowledge base</td>
<td>Enable this option to install the knowledge base for the application.</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Dependency</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Enable managed documents</td>
<td>Enable this option to add a related list to managed documents.</td>
<td></td>
</tr>
<tr>
<td>Enable task activities</td>
<td>Enable this option to log the task interactions and communications, such as phone calls and email messages.</td>
<td></td>
</tr>
</tbody>
</table>

**Associated Task Tables**

| Select associated tables   | Click Add to select more 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>
<thead>
<tr>
<th>Configuration setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR profile fields that users or managers can edit without HR approval include &lt;number of fields&gt;</td>
<td>Select the HR profile fields that are editable. Click Save to exit the selection dialog and save your changes. 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. The sensitive and employment information fields marked editable allows the manager of the employee or an HR agent to submit 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 and closed.</td>
</tr>
<tr>
<td>Human Resources group email</td>
<td>Enter the email address for the HR team. This email address is for the Contact HR link on the HR Portal. When it is used, an HR case is created using an inbound email action.</td>
</tr>
<tr>
<td>Configuration setting</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Automate state flows</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If state flows are automated, HR agents are not able to manually change the state of HR cases and tasks.</td>
</tr>
<tr>
<td></td>
<td>If state flows are not automated, the state of HR cases and tasks can be changed manually. Also, the HR business rules that invoke the state flow process are inactive.</td>
</tr>
</tbody>
</table>

| Default HR case priority for VIP user is 2-High | 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. HR agents or the manager of the employee changes sensitive information. For example, employees can change their home address and personal email address, but the manager must update the 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.

<table>
<thead>
<tr>
<th>Personal information fields</th>
<th>Sensitive and employment information fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Home address</td>
<td>• Date of birth</td>
</tr>
<tr>
<td>• Home city</td>
<td>• Department</td>
</tr>
<tr>
<td>• Home country</td>
<td>• Employee number</td>
</tr>
<tr>
<td>• Home phone</td>
<td>• Employment end date</td>
</tr>
<tr>
<td>• Home state/province</td>
<td>• Employment start date</td>
</tr>
<tr>
<td>• Home zip/postal</td>
<td>• Employment status</td>
</tr>
<tr>
<td>• Middle name</td>
<td>• Employment type</td>
</tr>
<tr>
<td>• Personal email</td>
<td>• Ethnicity</td>
</tr>
<tr>
<td>• Personal mobile phone</td>
<td>• First name</td>
</tr>
<tr>
<td>• Prefix</td>
<td>• Gender</td>
</tr>
<tr>
<td>• Work email</td>
<td>• Last name</td>
</tr>
<tr>
<td>• Work mobile</td>
<td>• Location</td>
</tr>
<tr>
<td>• Work phone</td>
<td>• Location type</td>
</tr>
<tr>
<td></td>
<td>• Manager</td>
</tr>
<tr>
<td></td>
<td>• Marital status</td>
</tr>
</tbody>
</table>
Personal information fields | Sensitive and employment information fields
--- | ---
• Nationality | • Notice period
• Notice period | • Place of birth
• Place of birth | • Position
• Position | • Probation end date
• Probation end date | • Probation period
• Probation period | • Time type

In the configuration option field list, all personal information fields are enabled for edit by default. 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.

ACLs control the HR profile personal information fields, which can be modified when more controlled access is needed.

The employment information fields that you enable for edit allow the manager of an employee to update the field. However, the manager cannot open the HR profile of the employee. 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 HR profile of the employee.
• 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 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 HR profile information for an employee, 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.

HR catalog items can be customized and integrated with a 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. The HR manager for Allan submits an Employee onboarding request from the HR catalog or HR service 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 the personal information of Alan from the onboarding form. The HR team can add information to HR profile to store and track all the data Alan 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, the user record for Alan is automatically created and linked to the HR profile. Standard HR tasks are automatically created for the HR team to fulfill, such as setting up payroll and benefits, and performing a background check.

4. A workflow automatically generates requests to provide Allan with the correct IT hardware, software, and systems access based on department, location, and position.

5. When all the tasks are complete, the HR department confirms that everything is ready for the 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 when 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.
2. Create or customize a catalog item that creates the HR case.
3. Create the workflow to process the request, including any of the following relevant configurations.
   - Approval rules
     Review and approve, or reject the request. For example, to approve a request for a leave of absence.
   - Assignment rules
     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
     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
     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

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capture information</td>
<td>• When an employment offer is accepted, capture basic information about the new employee.</td>
</tr>
<tr>
<td></td>
<td>• Create an HR case and HR profile for the employee with the captured information.</td>
</tr>
<tr>
<td></td>
<td>• Request approval for onboarding.</td>
</tr>
<tr>
<td>Approval</td>
<td>• Approve the onboarding request, then generate the tasks for this work, such as:</td>
</tr>
<tr>
<td></td>
<td>• HR tasks, such as performing reference checks.</td>
</tr>
<tr>
<td></td>
<td>• Non-HR requests, for example, relevant hardware and software that generate service catalog requested items. Non-HR departments fulfill these requests.</td>
</tr>
</tbody>
</table>
Employee Onboarding HR Workflow

Review detailed overview of the predefined HR automated process for employee onboarding to ensure that it meets the needs of your organization. Optionally, 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 service portal, which enters an employee data management case.

An HR employee is assigned the case, approval must be granted before any work can be done. After approval, the HR employee defines the onboarding tasks for onboarding the new hire.

The new hire uses the HR Service Portal to complete the onboarding tasks.

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 exists 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. Sensitive information is captured at an early stage.

**Note:** If the onboarding request is created from the New record form, the user must begin by selecting the HR - Employee Data Management category. The user can click New, complete the information, and then submit the HR case.

After the request is submitted:

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 name appears in the Opened for field in the Employee Data Management Case page.
3. The state of the HR case is set to Ready.
4. The Employee Onboarding HR Workflow sends an email to approvers to request approval to onboard the new employee.
1. The hr_case.approved fulfillment event occurs. The following subflows and order guides are launched.

2. An HR tasks workflow to generate tasks for the HR team to perform.
   - Employee information change
   - Employee offboarding
   - Employment verification letter
   - New hire onboarding
   - New employee payroll setup
   - New employee background checks
   - New employee anti-corruption policy acceptance
   - New employee benefits set up
   - New employee training requirements

3. An IT tasks workflow generates a service catalog request for the IT team. The IT Employee Onboarding Action script action triggers and runs an order guide using the Scriptable Order Guide activity.
   - 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.
   - 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.

   **Note:** If the onboarding case is canceled, requested items are also canceled.

4. On the day before the employment start date, a welcome email is sent to the manager of the new employee. To introduce the new employee, the manager can modify and send this email to the team.

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

6. When all generated HR tasks and requested items are completed, the following actions take place.
   - The 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 when there are incomplete HR tasks or requests.

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. Requested items are canceled.
5. 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. This request 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 to 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 HR profile for the employee 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 event triggers:
   • The Employee Offboarding HR Tasks Workflow to add HR tasks to the HR case. The offboarding workflow dynamically generates tasks from the template just like onboarding.
   • The IT Employee Offboarding Action script action to retrieve the assets of an employee 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 when there are incomplete HR tasks or requests.

   • The employment status for the HR case and HR profile is 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 the manager of an employee to update the field. However, the manager cannot open the HR profile of the employee. 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 HR profile of the employee.
- 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 HR processes, you can customize the way HR profile information is processed. Keep in mind that some of the fields that appear are referenced from the User [sys_user] table.

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, the system administrator cannot view it. For more information, see [HR profile and HR case security](#) on page 98.

**Associate profiles with user records**

An HR profile record must be associated with the employee record in the User [sys_user] table, to ensure that both employee records can be accessed conveniently. 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.

Certain fields are displayed in both the user and HR profile records, but they are in only one of the tables, User [sys_user] or HR Profile [hr_profile]. The following fields are in the User [sys_user] table.

- Prefix [introduction]
- First name [first_name]
Note: Bot phone number sync is not supported.

The following table describes the other fields that are synchronized by the Synchronize fields to hr_profile business rule.

Table 10: Fields synchronized using the business rule

<table>
<thead>
<tr>
<th>HR profile [hr_profile] field</th>
<th>User [sys_user] field</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Position [position]          | Title [title]         | Position in the HR profile is a referenced field. The HR profile could not be updated message appears:  
                                  • When the title is updated in the User form  
                                  • A position record with the same value does not exist |
| 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. The country code appears in the User form instead of the country name when the country selected in the HR profile is not in the choice list. |
| 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. |

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

HR case management

HR case management holds the details of HR requests, such as requests for information, and HR processes, such as onboarding and offboarding.

Users can submit HR cases through the HR Service Portal.
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 the requirements of your organization. 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. 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 paternity leave policy. Alan also wants to discuss flexible working hours around the expected time of the birth of his child.

1. Alan submits an HR request through the HR Service Portal 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.

**HR Service Portal**

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

The HR Service Portal view is different for employees working at the company and employees onboarding into the company. Depending on employee status, whether onboarding or already working at the company, users see a slightly different user interface. For example, an onboarding employee sees information about the company and company executives, as well as suggested reading articles. Onboarding tasks, such as completing a background check consent, are listed. Widgets without data do not appear on the HR Service Portal.
Figure 3: HR Service Portal

From the HR Service Portal, you can:

- View top rated knowledge base articles or search for HR knowledge articles that answer your questions to quickly access top-rated articles. As you type, articles are suggested based on keywords.
- View your HR profile and upload a company photo. You can update fields that are not disabled in your HR profile.
- View your HR cases, requests, approvals (if you are an approver), team, and organization chart.
- Submit HR questions and requests that are not answered in HR knowledge articles.
- View weather and a map for your location.
- Chat with an HR specialist. (An administrator must enable the HR chat queue for the link to appear.)
• Email HR to create your request.
• Browse the HR Service Catalog to:
  • Enroll in benefits.
  • Request direct deposit for your paycheck.
  • Select or modify benefits or beneficiaries.
  • Request to onboard or offboard employees.
  • Report or ask about disciplinary issues.
  • Request HR Service Portal support.

• View your assigned tasks to complete.
• View tasks HR, Facilities, and IT are completing.

From the HR Service Portal, pre-hired employees can:
• View Start Date and Days Left until the first day of work.
• View My Tasks, to read and accept documents with an e-signature, view team and organization chart, and email with anyone on the team.
• Submit HR questions and requests that are not answered in HR knowledge articles.
• View tasks HR, Facilities, and IT are completing.
• View weather and a map for the job location.
• Chat with or email an HR specialist. (An administrator must enable the HR chat queue for the link to appear.)

Note: The HR Service Portal requires Microsoft Internet Explorer 10 or above. The HR Service Portal page does not work in Microsoft IE9 or below. Use the HR Catalog module to submit an HR case.

Enroll in or modify benefits from the HR Service Portal

You can open the HR Service Portal to enroll in benefits or modify your existing benefit plan.

There are several types of benefits in the Catalog section of the HR Service Portal that require enrollment.

Medical Benefits
Use this link to download and complete the applicable enrollment form and upload to HR. You can also ask questions about benefit options or the enrollment process.

Dental Benefits
Use this link to download and complete the applicable enrollment form and upload to HR. You can also ask questions about benefit options or the enrollment process.

Vision Benefits
Use this link to download and complete the applicable enrollment form and upload to HR. You can also ask questions about benefit options or the enrollment process.

Pharmacy Benefits
Use this link to download and complete the applicable enrollment form and upload to HR. You
can also ask questions about benefit options or the enrollment process.

**401(k) Plan**

Use this link to download and complete the applicable enrollment form and upload to HR. You can also ask questions about benefit options or the enrollment process.

**Direct Deposit**

Enroll in direct deposit for your paycheck by clicking on the Payroll link.

1. Navigate to Self-Service HR Service Portal.
2. Under Browse HR Service Catalog, select Benefits. The benefits category opens.
3. Select the item to enroll in or modify, such as Medical Benefits.
   The Medical Benefits page opens to display the current medical coverage provider and related knowledge documents available to read for information.
4. Review the knowledge articles that appear if desired. Otherwise, continue with the remaining steps.
5. Under What would you like to do today?, select Enroll in or modify your medical plan.
   An instruction to download and complete the applicable enrollment form will appear. A link to the form to download will also appear under Forms.
6. Click on the applicable form.
   The form will download to your computer.
7. Open the form and complete the required information.
8. Save the form to your computer.
9. Return to the Medical Benefits page on the HR Service Portal to attach your completed form.
10. Click Add attachments.
11. Browse to your completed form on your computer and click or double click the form you want to attach.
12. Click Submit.

After submitting the completed form the process to enroll you in the company medical benefit plan will begin.

Follow the same steps to enroll in dental, vision, pharmacy, 401(k), and direct deposit benefit plans.

**Submit a request from the HR Service Portal**

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

There are several ways you can make a request or ask a question on the HR Service Portal.

**Catalog**

Use the Catalog link in the top banner of the HR Service Portal to access all the HR categories available on the portal. From any of these categories you can ask a general question or make a request by clicking on the category.

**Browse the HR service catalog**

Click on any of the category links under Browse HR Service Catalog to access specific HR categories available on the portal. From any of
these categories you can ask a general question or make a request.

**General inquiries**

Click on the General Inquiries category link under Browse HR Service Catalog to ask a question not specific to any of the portal categories.

**Chat with or email HR**

You can chat with HR or email your questions or requests to HR by using the Chat with HR and Email HR links in the top banner of the HR Service Portal.

1. Navigate to Self-Service HR Service Portal.
   - Browse HR Service Catalog and select the topic that pertains to your question or request.
   - Catalog in the top banner of HR Service Portal and select the topic that pertains to your question or request.

2. Review the knowledge documents that appear, and if your question or request is resolved, exit the form. Otherwise, continue with the remaining steps.

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 page refreshes to display your open cases and a link to the case in My Open Cases. You can check the case to see who it was assigned to.

**Submit a case from the HR Service Portal catalog**

You can submit HR cases from the HR Service Portal catalog.

1. Navigate to Self-Service HR Service Portal.
2. Select Catalog in the top banner section of the page.
   - The Catalog View page opens displaying all the HR categories in the catalog.
3. Select the appropriate item within the catalog to create your case.
4. Complete the form according to your question, request, or action.
5. Click Submit.
   - The page refreshes to display your open cases and a link to the case in My Open Cases. You can check the case to see who it 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.

You can request an employment letter either through the Catalog in the top banner area of the portal page or through Browse HR Service Catalog. 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 Service Portal.
2. Under Browse HR Service Catalog, select Employee Data Management.
   - As an alternative, you can also click on Catalog in the top banner area of the portal page to get to the request form.
3. Select Employment Verification.
   The form to request an employment verification letter opens.

4. Complete the form, entering the reason you need the letter, the name of the company or institution,
   the name of your contact and the address, and the contact's email address.

5. 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 Service Portal or Catalog.

When you submit the request, you must attach required documentation to the case. Typically this is your
payment receipt and transcript/course completion.

You can request tuition reimbursement either through the Catalog in the top banner area of the portal page
or through Browse HR Service Catalog.

1. Navigate to Self-Service HR Service Portal.
2. Under Browse HR Service Catalog, select Benefits.
   As an alternative, you can also click on Catalog in the top banner area of the portal page to get to the
   request form.
3. Select Tuition Reimbursement.
4. Review the knowledge documents that appear if desired. Otherwise, continue with the remaining
   steps.
5. Select Submit a reimbursement request for an approved course.
6. Select the approved course for reimbursement from the drop down list.
7. Click the boxes next to each category if you have digital copies of your payment receipt and
   transcripts/course completion.
8. Drag and drop the documents from your file browser into the form or click the attachment icon to
   navigate to the document location and select them to attach.
   The documents appear at the top of the form. You can view them, or click Manage Attachments to
   remove them if necessary.
9. Click Submit.
   The case is created with two tasks: one can be seen in HR Tasks for the HR agent to review the
documents, and one for a payroll agent to process the reimbursement. You can see the case in My
Open Cases on the HR Service Portal.

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 Service Portal.

1. Navigate to Self-Service HR Service 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. Under My Open Cases click the case number to see its details.
3. Enter comments under Conversation if necessary.
4. 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 question or request.

On the HR Service 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 Service Portal
2. Click Knowledge Base in the banner.
   The Knowledge Base window opens.
3. You can read Top Rated Articles or articles associated with various categories, such as, Benefits, FAQ, or Payroll or enter your search text and do one of the following:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open an article that appears below the search box</td>
<td>Click the article name.</td>
</tr>
<tr>
<td>Open the HR knowledge base advance search</td>
<td>Click Search at the top of the list.</td>
</tr>
</tbody>
</table>

4. 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.

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.

Email HR

You can use the Email HR link on the HR Service Portal to email an HR. The HR agent can open a case from the email content if your question or request needs further investigation.

1. Navigate to Self-Service HR Service Portal.
2. Click Email HR in the banner.
   An new email opens addressed to HR.
3. Type the email subject and your content and press Send.
   The HR agent or group monitoring the email can transfer the email to another HR agent if necessary, or create an HR case. Either of you can attach files to the email, such as policy documents or screen shots.

Chat with HR

You can use the Chat with HR link on the HR Service 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 Service Portal.
2. Click Chat with HR in the banner.
   The HR department chat queue opens in a new window.
3. Enter your question and press Send. 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.

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. Perform one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To respond from the email notification</td>
<td>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. Click the attachment icon and attach the documents, and then click Update.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>To navigate to the task in the HR Service Portal</th>
<th>Select My Tasks and complete the following steps.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Open the request that requires documentation. You see a message at the top that action is required.</td>
<td></td>
</tr>
<tr>
<td>2. Click the link in the message. A dialog window opens.</td>
<td></td>
</tr>
<tr>
<td>3. If you know the documents that need to be attached, click the attachment icon and attach them.</td>
<td></td>
</tr>
<tr>
<td>4. If you are not sure what to attach, click the arrow next to the Document requested for HR Case to see what the HR agent asked for.</td>
<td></td>
</tr>
<tr>
<td>5. Click the attachment icon and attach the documents, and then click Update.</td>
<td></td>
</tr>
</tbody>
</table>

You can also attach files by dragging and dropping them from your file browser into the HR task or HR case form.

The task changes from blue to gray and a check mark appears in the task box under My Tasks indicating the task is Closed Complete. A notification is sent to the HR agent that the documentation is available.
Create an HR case

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

Role required: hr_basic or hr_case_writer

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

1. Navigate to HR - Case Management Case Management Create New Case.
2. The HR Case form opens. The workflow stages are listed across the top, and the new case is in the Draft stage.
3. Complete the fields on the left side of the form.

Table 11: HR case fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>The auto-assigned case ID number, which cannot be changed.</td>
</tr>
<tr>
<td>Opened for</td>
<td>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. If you are creating an onboarding case, the user is not yet in the system. Leave this field blank and select the Onboarding category.</td>
</tr>
<tr>
<td>Location</td>
<td>The geographical location of the user associated with the case.</td>
</tr>
<tr>
<td>Department</td>
<td>The department of the user associated with the case. If you select the department, the Manager field is populated if there is an assigned department head.</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the HR case. By selecting the category, you can save the new case and initiate the auto-assignment process, if one is available. Note: Some of the case categories have an associated workflow. If you select the Onboarding category the Create Onboarding User dialog opens. Proceed with step 3 below.</td>
</tr>
<tr>
<td>HR profile</td>
<td>The associated HR profile, if any. Click Create Profile to automatically generate the HR profile if none exists.</td>
</tr>
</tbody>
</table>
3. If you selected the Onboarding category, enter the user’s name and email address in the Create Onboarding User dialog.

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

5. 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. 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.

6. To preview and attach a knowledge article to the case, complete the following steps.
   a) 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.
   b) 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.

7. Complete the form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>The state of the case.</td>
</tr>
<tr>
<td>Priority</td>
<td>The precedence of the case, based on the category and whether the employee is a VIP.</td>
</tr>
<tr>
<td>Opened</td>
<td>The date and time the case is opened.</td>
</tr>
<tr>
<td>Opened by</td>
<td>The user creating the record.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>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 Assigned to field. Assignment groups are restricted to those groups with a type of human_resources.</td>
</tr>
<tr>
<td>Assigned to</td>
<td>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.</td>
</tr>
<tr>
<td>Watch list</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Skills</td>
<td>The required skills of the person assigned to this category of HR case.</td>
</tr>
<tr>
<td>Short description</td>
<td>A brief description of the case. A default value appears if you selected a category.</td>
</tr>
<tr>
<td>Description</td>
<td>A longer, more detailed description of the case.</td>
</tr>
<tr>
<td>Work notes or additional comments</td>
<td>Additional information about the case. Click Work notes to add it as an internal work note. Enter the information and click Additional comments if you want the user to see it.</td>
</tr>
</tbody>
</table>

8. Depending on the case category, HR profile fields may appear. Enter any new or changed profile information for the user.

9. Click an option under Related Links to add tasks, employment history, or emergency contacts, or to see the caller's organization chart.

10. 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 HR - Case Management Case Management Case SLAs. You can also run SLA reports.

View HR case information

There are several methods to locate a specific HR case.

Role required: hr_case_reader

1. Navigate to HR - Case Management 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.
   - Closed: all closed cases.
   - All: all cases.
   - Case SLAs: all cases with SLAs.

2. Select the case to view.

Checklists in HR cases and tasks

A feature of tasks is the ability to add a checklist. In an HR case or task, a checklist can serve as a reminder to the HR agent to ensure that the 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 Service Portal when the employee gets a promotion. An HR case is created with the request to change the title and position. This HR case involves changes not only to the HR profile, but also to the records in the payroll and performance management systems for the employee.

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 communicate the promotion within the organization. For example, the checklist items are:
   - Get the promotion into next company newsletter
   - Let the manager know when the change reflects in the system
   - Remind the employee to order new business cards, if 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.

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

Create an HR case from a chat

If an HR chat results in the need to open a case, create the case directly from the conversation.

Role required: hr_basic or hr_case_writer

When you create an HR case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.


2. Click the support tab of the Connect sidebar, indicated by a headset icon ( ).

3. Under Cases, open an HR conversation.

4. At the bottom of the conversation, click the menu icon ( ) to open the Connect actions menu.

5. In the Connect actions menu, select Create HR Case. In the conversation tools area to the right of the conversation, a new case form opens in a record tab. The system automatically sets certain fields based on conversation details.

6. Complete the form as necessary and click Submit.
Any comments or work notes in the record conversation appear as comments on the incident form. Work notes do not appear in the chat for the ESS user. The chat agent can select whether a message is a Comment or Work Note in the conversation.

a) In the record conversation, by the text entry field, click the message type icon.

b) Select Comment or Work Note.

c) Enter a message.

By default, record conversation messages are added as comments.

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**Note:** If you add an attachment to a record conversation, it is attached to the underlying record as well.

The system automatically shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table. Any new journal fields added to the record do not appear in the chat.

---

**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.
- For VIP employees, check the VIP box on their User [sys_user] record.

---

**Note:** The VIP check box does not show by default. Customize the User record form in the Form Designer to show the VIP check box.

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_basic, 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 **HR - Case Management** My Approvals , and then select the record.
   - Navigate to **Self-Service HR Service Portal** and click My approvals.

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_basic

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 4: HR chat queue notification](image)

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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept a conversation from a queue</td>
<td>Under Queues, click Accept by the queue. The conversation opens in the conversation pane and an entry appears in the Cases section of the sidebar.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Accept a transfer request</td>
<td>Under Cases, click Accept by a transfer request.</td>
</tr>
</tbody>
</table>

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.

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_basic 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 appear 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 a 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 are for the default HR configuration. Your organization may have configured the workflow. If so, you may experience differences in the process flow.

1. From the HR Case Dashboard or another list of open HR cases, open the HR case to work on.
   When the name in the Opened for field is in red, the HR case is for a VIP user and prioritized over other cases. The service level agreement (SLA) is set to a shorter duration.

   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. Also, you can see
which knowledge base articles the user looked at by reviewing the KB article read by user (#) related list.

2. If the HR case is assigned to someone else and you are taking it over, click Assign to Me at the top of the form. The form refreshes and your name appears in the Assigned to field.

3. If the state is Draft or Ready, click Start work in the form header. The state changes to Work in Progress.

4. Perform any of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update employee HR profile information</td>
<td>Enter information in any of the following sections or related lists:</td>
</tr>
<tr>
<td></td>
<td>• Employment Information</td>
</tr>
<tr>
<td></td>
<td>• About Employee</td>
</tr>
<tr>
<td></td>
<td>• Contact Information</td>
</tr>
<tr>
<td></td>
<td>• Emergency Contacts</td>
</tr>
<tr>
<td></td>
<td>• Employment History</td>
</tr>
</tbody>
</table>

**Note:** Depending on the case category, you may not see all sections and related lists.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach a knowledge article</td>
<td>Follow the steps in <em>Attach a knowledge article to an HR case</em> on page 94.</td>
</tr>
<tr>
<td>Request more information</td>
<td>Follow the steps in <em>Suspend and resume an HR case</em> on page 75.</td>
</tr>
<tr>
<td>Order request items</td>
<td>Click New in the Requested Items related list. Complete the form and click Submit.</td>
</tr>
<tr>
<td>Add tasks</td>
<td>Click Add Task under Related Links. Select the type of task to create. Complete the form, click Ready for Work, and click Submit. You can reopen the task and click Start Work when the task is assigned to you and you are ready to work on it.</td>
</tr>
</tbody>
</table>

5. To view the manager of the user in the Opened for field, scroll to Related Links and click Show employee org chart.

When finished viewing the org chart, click the back arrow on the upper left.

6. If you determine that the case can be canceled, click Cancel at the top of the form. A popup window appears. Write the reason for canceling the case in the Work note field and click OK.

7. 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 to complete the checklist.
   d) 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 finished, perform one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close the case</td>
<td>Enter resolution information and click Comment for the caller to see the note or Work Note for internal information. Click Close Complete at the top of the form.</td>
</tr>
</tbody>
</table>

**Note:** All HR tasks must be closed before the parent HR case can be closed.

| Save the case to continue working on it | Enter work notes describing your progress and click Update.                  |

If you closed the case, the state changes to Awaiting Acceptance and 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. 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_basic 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 **HR - Case Management - 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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin working on a new task</td>
<td>Click Start work.</td>
</tr>
</tbody>
</table>

**Note:** The parent HR case must be in progress for you to start work on the task.

| Close a task                      | Enter information in the Work notes field and other fields as needed, and change the State to Closed Complete. |

**Note:** All HR tasks must be closed before the parent HR case can be closed.

| Clone the task to create a new task | Click the Clone Task related link. Enter the new task information in the task form and click Update. |

<p>| Cancel the task                   | Click Cancel Task in the form header.                                      |</p>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Review the progress of sibling tasks</strong></td>
<td>Scroll to the Sibling Tasks related list. If sibling tasks are listed, click a task number to see the details.</td>
</tr>
</tbody>
</table>

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. 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.

When no choices appear and you want to suspend the case, open the parent HR case and suspend it. You can suspend the HR case from more than one task, when needed.

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. 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 to complete the checklist.
   d) 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_basic 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. Open the HR case to suspend.
   You must begin work on the case before you can suspend it.

2. Click Suspend.
   The Suspend Reason pop-up window opens.

3. 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.

4. 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.

5. To resume a suspended HR case, open the case and click Resume.
The SLA progress is resumed.

Request user documentation

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

Role required: hr_basic 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.
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.

Case management

You can use the HR Service Management 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 reports and other widgets. You click a listed record or a segment in a report 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_basic

By default, the Overview dashboard shows the following reports.

• HR Cases Opened in the Last 6 Months By Category: Evaluate the types of cases that are handled over time and ensure that 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 reports and other widgets. For example, an HR benefits administrator may add a report to the Overview dashboard that shows the status of HR cases in the Benefits category.

1. Navigate to HR - Case Management Overview.
2. Perform any of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>See the information represented by a chart segment</td>
<td>Hold your cursor over the segment to see a tooltip with the details.</td>
</tr>
<tr>
<td>See the corresponding cases for a chart segment</td>
<td>Click the chart segment. A list of the cases opens.</td>
</tr>
<tr>
<td>Save the chart as an image file</td>
<td>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.</td>
</tr>
</tbody>
</table>

Manage HR cases by reporting

You can use the Human Resources Overview (Reporting) dashboard to monitor and manage HR cases by reporting.

Role required: hr_basic

By default, the Overview (Reporting) dashboard shows the following reports.

• Critical Cases Open: Overview.
• Unassigned Cases: Overview.
• Open Cases With Breached SLAs: Overview.
• Cases Awaiting Approval: Overview.
• New Hires Starting This Month: Overview.
• Open Cases not Updated for 7 Days: Overview.
• Open HR Cases - Grouped Bar chart.
• Open HR Cases Older Than 30 Days - Grouped: Bar chart.
• Open HR Cases By Priority and State Heatmap chart.
• Open HR Cases Older Than 30 Days by Priority and State: Heatmap chart.
• HR Cases Open per Month Line graph.
• HR Cases Closed per Month: Line graph.

You can customize the dashboard to add or remove reports and other widgets. You can group and stack the grouped charts using a chart configuration choice list below the charts. Group and stack by: Priority, State, Category, Assignment group, Department, or SLA.

1. Navigate to HR - Case Management Overview (Reporting).
2. Perform any of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>See the information represented by a chart segment</td>
<td>Hold your cursor over the segment to see a tooltip with the details.</td>
</tr>
<tr>
<td>See the corresponding cases for a chart segment</td>
<td>Click the chart segment. A list of the cases opens.</td>
</tr>
<tr>
<td>Save the chart as an image file</td>
<td>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.</td>
</tr>
<tr>
<td>Edit the chart or widget, refresh, or close.</td>
<td>Click and point to the chart segment. Icons appear in the right upper corner of the chart.</td>
</tr>
</tbody>
</table>

Use the HR Manager Dashboard

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

Role required: hr_manager

By default, the Manager Dashboard shows the following reports:

• Case Satisfaction Survey - 30 Day AVG: Evaluate the satisfaction of employees with the handling of HR cases. This chart shows 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 reports and other widgets. For example, an HR benefits administrator may add a report to the Manager Dashboard that shows the assignment and state of HR cases in the Benefits category.

1. Navigate to HR - Case Management Manager Dashboard.
2. Perform any of the following actions.
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 shows the following 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 widgets 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 HR - Case Management Onboarding Dashboard.
2. Perform any of the following tasks.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>See workflow task descriptions in the list of onboarding cases</td>
<td>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.</td>
</tr>
<tr>
<td>Work on an HR case</td>
<td>Click the case number. After you make changes and click Update, the Onboarding Dashboard reopens.</td>
</tr>
<tr>
<td>See the cases for a chart segment</td>
<td>Click the chart segment. A list of the cases opens.</td>
</tr>
<tr>
<td>Review the cases or tasks assigned to an HR agent</td>
<td>Click the name of the HR agent in the Active HR Onboarding Cases by Assigned To or Active HR Onboarding Tasks by Assigned To list.</td>
</tr>
</tbody>
</table>
### Option

<table>
<thead>
<tr>
<th>See the status of IT fulfillment requests</th>
<th>Click the request state in the Active HR Onboarding IT Requests list. Select a request, and view the items in the Requested Items related list.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save the chart as an image file</td>
<td>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.</td>
</tr>
</tbody>
</table>

---

### Run HR reports

You can run reports to view and monitor the 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 **HR - Case Management 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 at the bottom.

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 view them on the Reports list.

### Available HR reports

Predefined HR reports are available in the **HR - Case Management Reports** list.

<table>
<thead>
<tr>
<th>Report name</th>
<th>Description</th>
<th>Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active HR Cases</td>
<td>Tabular view of all active cases.</td>
<td>Number, Type, Category, State, Short description, Opened by, Assignment group, Assigned to</td>
</tr>
<tr>
<td>Active HR Cases Pivot Table by Category</td>
<td>Pivot table view of all active cases.</td>
<td>Assigned to, Category</td>
</tr>
</tbody>
</table>

---
<table>
<thead>
<tr>
<th>Report name</th>
<th>Description</th>
<th>Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active HR Onboarding Cases by Assigned To</td>
<td>Tabular view of active onboarding cases, grouped by Assigned to.</td>
<td>Number, Priority, State, Short description, Opened by, Opened for, Assignment group, Assigned to</td>
</tr>
<tr>
<td>Active HR Onboarding IT Requests</td>
<td>Tabular view of onboarding tasks assigned to IT, for example, for computers and other office equipment.</td>
<td>Number, Priority, State, Short description, Assigned to, Location</td>
</tr>
<tr>
<td>Active HR Onboarding Tasks by Assigned To</td>
<td>Tabular view of open HR tasks for active onboarding HR cases, grouped by Assigned to.</td>
<td>Number, Case, Priority, State, Short description, Assignment group, Assigned to</td>
</tr>
<tr>
<td>Case Satisfaction Survey - 30 Days AVG</td>
<td>Bar chart showing the averages over 30 days of responses to the HR case satisfaction survey.</td>
<td>Average Actual Value, Metric</td>
</tr>
<tr>
<td>Cases Awaiting Approval</td>
<td>Count of unapproved HR cases or requests.</td>
<td>Number</td>
</tr>
<tr>
<td>HR Case SLAs by Assigned</td>
<td>Bar chart showing the number of overdue cases by the assigned user.</td>
<td>Count, User, State</td>
</tr>
<tr>
<td>HR Case SLAs by Elapsed Time Percentage</td>
<td>Bar chart showing the number of cases by the elapsed time percentage until the SLA is breached.</td>
<td>Count, Elapsed time percentage</td>
</tr>
<tr>
<td>HR Case Transfer Rate</td>
<td>Bar chart showing the number of times the assigned HR agent was changed by category for the last six months.</td>
<td>Number of reassignments, Category</td>
</tr>
<tr>
<td>HR Cases Opened Last Month by Category</td>
<td>Bar chart of cases raised over the last month by HR case category.</td>
<td>Category, Count, Month</td>
</tr>
<tr>
<td>HR Cases Opened This Month by Category</td>
<td>Bar chart of cases raised over the current month by HR case category.</td>
<td>Category, Count</td>
</tr>
<tr>
<td>HR Onboarding by Location</td>
<td>Bar chart showing the number of onboarding cases by location.</td>
<td>Location, Count</td>
</tr>
<tr>
<td>My HR Cases by Category</td>
<td>Pie chart of cases assigned to you, where each slice represents an HR case category.</td>
<td>Category, Count</td>
</tr>
<tr>
<td>Number of HR Profiles</td>
<td>Count of HR profile records.</td>
<td>Number</td>
</tr>
<tr>
<td>Open High Priority Cases</td>
<td>Count of active high priority HR cases</td>
<td>Number</td>
</tr>
<tr>
<td>Open Onboarding cases</td>
<td>Count of active onboarding cases</td>
<td>Number</td>
</tr>
</tbody>
</table>
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 14: HR SLAs

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

One of these SLAs is automatically assigned to each opened case. An administrator can modify these SLAs or create 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 15: Modules to view HR SLAs

<table>
<thead>
<tr>
<th>HR Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Dashboard</td>
<td>Shows the HR Case SLAs by Elapsed Time Percentage report, which shows the aging of active HR case SLAs.</td>
</tr>
<tr>
<td>Performance Analytics</td>
<td>Shows the Active HR Cases SLA Indicator per Week- By AVG chart, which shows the average number of cases that were in each aging bucket, from the past four weeks.</td>
</tr>
<tr>
<td>Case Management Case SLAs</td>
<td>Shows a list of all HR cases with their SLAs.</td>
</tr>
</tbody>
</table>
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 16: SLA scheduled jobs

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLA update (already breached)</td>
<td>Repeats every day.</td>
</tr>
<tr>
<td>SLA update (breach after 30 days)</td>
<td>Repeats every 5 days.</td>
</tr>
<tr>
<td>SLA update (breach within 1 day)</td>
<td>Repeats every hour.</td>
</tr>
<tr>
<td>SLA update (breach within 1 hour)</td>
<td>Repeats every 10 minutes.</td>
</tr>
<tr>
<td>SLA update (breach within 10 min)</td>
<td>Repeats every 1 minute.</td>
</tr>
<tr>
<td>SLA update (breach within 30 days)</td>
<td>Repeats every day.</td>
</tr>
</tbody>
</table>

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 HR - Case Management 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:** 2015-06-19 09:36:25

<table>
<thead>
<tr>
<th>SLA definition</th>
<th>Stage</th>
<th>Has breached</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Case SLA - 4hours</td>
<td>In progress</td>
<td></td>
</tr>
</tbody>
</table>

**Task:** HRC0000204

**Updated:** 2015-06-19 09:38:14

**Timings**

<table>
<thead>
<tr>
<th>Start time</th>
<th>2015-06-18 16:30:22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stop time</td>
<td>2015-06-19 13:36:22</td>
</tr>
</tbody>
</table>

**Actual elapsed time**

- Days: 0
- Hours: 17 07 52

**Actual elapsed percentage:** 90.16%

**Actual time left**

- Days: 0
- Hours: 01 52 08

**Business elapsed time**

- Days: 0
- Hours: 02 07 52

**Business elapsed percentage:** 53.28%

**Business time left**

- Days: 0
- Hours: 01 52 08

**Schedule:** 8-5 weekdays excluding hol.

**Timezone:** US/Pacific

**Related Links**

- Show SLA Timeline
- Show Workflow

---

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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 considers the schedule. 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 purchases a subscription to Performance Analytics Premium and an administrator activates the plugin.

Role required: hr_basic

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  HR - Case Management 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 and Reporting.

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  HR - Administration 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.

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

If the survey was not submitted anonymously, you can see how users answered and follow up if necessary.
4. To review the survey scorecard, click the View Scorecard related link and perform any of the following tasks.

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
</table>
| Display a different view for the scorecard | Select the view from the left choice list above the chart.  
The interactive scorecard shows the name of the survey and results or comparisons of the ratings.  
You can shows results in the following views:  
• Category Results  
• Question Results  
• Average Ratings  
• History |
| Save a chart as an image      | Click the menu icon and select the type of image file. After the file is generated, click Download.  
The file is downloaded to the download folder of the browser. |

**HR task management**

You can use the HR Tasks module to view and manage tasks assigned to you, open and closed tasks, as well as unassigned and all tasks.

You can view your HR case-related tasks and manage task work.

HR tasks and task states can be viewed at HR - Case Management HR Tasks.

**HR 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.
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 HR cases. Users receive an email with the survey link after they accept the resolution or when the HR case is closed incomplete. 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. Send a survey every time the condition is met, or set a probability 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 detailed information about working with surveys, trigger conditions, and survey questions, see the related topics for the Survey application.

Create or modify an HR survey

You can modify the predefined HR satisfaction surveys to suit the needs of an organization, and create additional 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 HR - Administration Surveys HR Surveys.
2. Click New or open an existing survey.
3. Complete the form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the survey, which appears on the questionnaire.</td>
</tr>
<tr>
<td>Description</td>
<td>Helpful information about the survey.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Signature             | Acknowledgement by a survey recipient of requirements, admonitions, or policies related to the survey. The signature may require the recipient to select a check box or to 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 New to create a new one. The signature form contains these fields:  
  • Name: Descriptive name for this signature.  
  • Signature type: Type of signature required. The selections are Check box, Full name, or Assertion only. If Assertion only is selected, no signature is required to submit the survey.  
  • Assertion: Text you want to display to recipients.  
  By default, a property called Require authentication for user signature is configured to require users to authenticate when providing a full name signature. |
| Active                | Check box to activate the survey definition. When the Active check box is cleared, new survey instances cannot be generated and users cannot complete existing survey instances. Use the Active check box to deactivate or activate a published survey. |
| Anonymize responses   | Check box to ensure that all responses for this survey are stored without the submitting users’ names. When a user submits a survey, the system clears the Assigned to field for the associated survey instance. Additionally, survey responses for anonymous surveys do not contain Assigned to values.  
  Note: The Assigned to field is cleared. However, each response record includes the Created By and Updated By fields that are accessible to users with the survey_admin role. |
| Send notifications    | Check box to send a notification that the survey has been taken.                                                                                                                                              |
| State                 | Status of the survey: Draft or Published.                                                                                                                                                                    |
### 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.

*Note:* 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.

### 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 `/survey-administration/reference/r_SurveyQuestionDataTypes.dita#r_SurveyQuestionDataTypes` 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 HR - Administration Surveys HR Surveys, and open the survey to add questions.
2. In the Metrics Categories related list, complete one of the following actions.

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

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.

---

### Publish a new HR survey

A new survey must be published 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 HR - Administration 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.

---

### 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 use the Incident table as an example; substitute HR case information to create an HR survey trigger condition.

1. Navigate to HR - Administration Surveys Trigger Conditions.

2. Click New.

3. Complete the form.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment</td>
<td>Survey to send.</td>
</tr>
<tr>
<td>Table</td>
<td>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.</td>
</tr>
<tr>
<td>User field</td>
<td>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.</td>
</tr>
<tr>
<td>Repeat interval</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Note:** Ensure that the Schedule period of the selected survey definition is set to No Limit. If the schedule period is set to a different value, it may prevent the trigger condition from sending surveys as expected.

<table>
<thead>
<tr>
<th>Application</th>
<th>[Admin only] Application is set to Global.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Check box that determines whether this trigger condition is active (selected).</td>
</tr>
<tr>
<td>Business rule</td>
<td>[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.</td>
</tr>
<tr>
<td>Trigger randomly</td>
<td>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).</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Probability (%)</td>
<td>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.</td>
</tr>
<tr>
<td>Related Field 1- 4</td>
<td>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. For example, if you select the Incident table, you might select Assigned to and Problem 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.</td>
</tr>
<tr>
<td>Note:</td>
<td>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.</td>
</tr>
<tr>
<td>Description</td>
<td>Summary information to identify the trigger condition.</td>
</tr>
<tr>
<td>Condition</td>
<td>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 [State] [is] [Closed].</td>
</tr>
</tbody>
</table>

4. Click Submit.

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 HR Service Management application provides the Human Resources General Knowledge base specifically for this content. Benefits of using this knowledge base include:

- 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, and 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 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 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, and retire.
- Schedule regular review of content so it can be updated or retired.

HR knowledge articles are managed through HR - Administration Knowledge Management modules. See ../../knowledge-management/topic/p_KnowledgeManagement.dita for information about how to create, edit, publish, and retire knowledge articles.

### 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_basic or hr_case_writer

1. Navigate to HR - Case Management Case Management and open one of the modules, such as Assigned to me or Open.
2. Open the HR case.
3. Click Knowledge results.
4. 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.
5. Review the list of suggested knowledge articles, and do any of the following:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preview the article</strong></td>
<td>Click Preview next to the article. After reviewing the article in the pop-up window, click Attach to HR Case if it is relevant, or click (X) to close the article.</td>
</tr>
</tbody>
</table>
| **Attach the article without previewing it** | Click Attach next to the article.  

**Note:** 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.

6. Click Save.

7. Alternatively, 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) 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.
Organization

You can create, modify, view, define, and maintain employee data for your organization.

Organization information is set up and maintained as follows.

- HR profiles within the organization
- User directory with all users in the organization (view only)
- Organization positions
- Organization locations (view only)
- Organization departments (view only)

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

Maintaining this data requires a defined process. 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.

HR profiles

HR profile records store confidential employee data, such as name, personal contact information, email addresses, employment history, and 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 are 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 the profile record to the employee 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, an HR profile is created automatically for Employee Data Management Cases.

Note: HR profiles are automatically created or modified when the HR case category is New Hire Onboarding, Employee Information Change, Employee Offboarding, or Employment Verification Letter.

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

<table>
<thead>
<tr>
<th>Section or related list</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes</td>
<td>Comments and work notes.</td>
</tr>
<tr>
<td>Employment Information</td>
<td>Information such as employment status and type of employment, employee number, and start and end dates.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Information such as address, phone number, personal email address. Some field values are copied from the onboarding form or from Workday when that integration is being used.</td>
</tr>
</tbody>
</table>
### Section or related list

<table>
<thead>
<tr>
<th>Section or related list</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Contacts</td>
<td>A list of the employee emergency contacts. One contact in the list is designated as the primary and others can be entered as alternates.</td>
</tr>
<tr>
<td>Employment History</td>
<td>List of prior employers and dates of employment.</td>
</tr>
<tr>
<td>Direct Reports</td>
<td>List of the employees who report directly to the user.</td>
</tr>
<tr>
<td>Colleagues</td>
<td>List of other employees who have the same manager as the user.</td>
</tr>
<tr>
<td>Cases</td>
<td>Open HR cases for the user.</td>
</tr>
</tbody>
</table>

### HR profile and HR case security

Because HR profile information is sensitive and confidential, it is secured from being viewed by the system administrator. The same is true for some of the information in HR cases and HR tasks.

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_basic.

Similarly, for HR cases and HR tasks, only authorized HR personnel should be allowed to view attachments, work notes and comments, description, calendar, and payload (if your company configured the form to show the Payload field). Authorized HR personnel include those who are assigned a role with hr_case_reader and hr_task_reader, such as hr_basic.

Therefore, access to specific HR profile, case, and task data is restricted from view by users with the admin role.

### 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
HR case and HR task information that system administrators can access

System administrators can view the employee user information, such as location and department, and the short description. Activities, such as state changes, are displayed in the activity stream, but comments and work notes are hidden.

When the system administrator opens an HR case or HR task, a message describes the information that is not displayed.

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 Profile link from the HR Service Portal displays no profile information. It displays only information in the related lists described above.

Customized profile information

As part of designing HR processes, you can customize the way HR profile information is processed. Keep in mind that some of the fields that appear are referenced from the User [sys_user] table.

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, the system administrator cannot view it. For more information, see HR profile and HR case security on page 98.

Associate profiles with user records

An HR profile record must be associated with the employee record in the User [sys_user] table, to ensure that both employee records can be accessed conveniently. 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.

Certain fields are displayed in both the user and HR profile records, but they are in only one of the tables, User [sys_user] or HR Profile [hr_profile]. The following fields are in the User [sys_user] table.

- Prefix [introduction]
- First name [first_name]
- Middle name [middle_name]
- Last name [last_name]
- Manager [manager]
- Department [department]
• Location [location]

**Note:** Bot phone number sync is not supported.

The following table describes the other fields that are synchronized by the Synchronize fields to hr_profile business rule.

### Table 20: Fields synchronized using the business rule

<table>
<thead>
<tr>
<th>HR profile [hr_profile] field</th>
<th>User [sys_user] field</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Position [position]          | Title [title]          | Position in the HR profile is a referenced field. The HR profile could not be updated message appears:  
  • When the title is updated in the User form  
  • A position record with the same value does not exist |
| 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. The country code appears in the User form instead of the country name when the country selected in the HR profile is not in the choice list. |
| 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. |

**Note:** The User form must be configured to show address, country, and email 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_basic, or hr_manager

The HR administrator [hr_admin] can configure which HR profile fields an employee can update. The employee submits an HR employee information change request for information that cannot be updated. To update the HR profile when an employee information change request is assigned to you, complete the following steps.

1. Navigate to HR - Administration Organization HR Profiles.
The HR Profiles list opens.

2. Find the existing HR Profile to update by selecting User from the HR Profiles list dropdown search menu. You can type the user name, and pressing Enter. Also, you can click a profile number to open a user profile.

To create an HR profile, click New from HR Profiles. Type the user name in the User field on the HR Profile New record form to create the profile. You cannot change the user name after an HR profile is saved.

3. Click the profile number to open the user profile.

The profile opens displaying populated name, manager, department, location, and contact fields from the user record.

4. Complete or update the form with as much additional information as you have.

<table>
<thead>
<tr>
<th>Section or related list</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes</td>
<td>Comments and work notes.</td>
</tr>
<tr>
<td>Employment Information</td>
<td>Information such as employment status and type of employment, employee number, and start and end dates.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Information such as address, phone number, personal email address. Some field values are copied from the onboarding form or from Workday when that integration is being used.</td>
</tr>
<tr>
<td>Emergency Contacts</td>
<td>A list of the employee emergency contacts. One contact in the list is designated as the primary and others can be entered as alternates.</td>
</tr>
<tr>
<td>Employment History</td>
<td>List of prior employers and dates of employment.</td>
</tr>
<tr>
<td>Direct Reports</td>
<td>List of the employees who report directly to the user.</td>
</tr>
<tr>
<td>Colleagues</td>
<td>List of other employees who have the same manager as the user.</td>
</tr>
<tr>
<td>Cases</td>
<td>Open HR cases for the user.</td>
</tr>
</tbody>
</table>

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 Service Portal.
2. Click on your name in the My Profile category.
3. Add or update your personal contact information by clicking in the information sections.
4. To add your Bio information, click Empty next to Bio and add a short description.
5. Click Upload Picture to browse to a photo file to add to your profile.
6. Click Create new contact to add to your My Contacts.
7. Click Update.

Add your contacts
Employees can add contact information to their HR profile and specify who to contact in an emergency.

1. Navigate to Self-Service HR Service Portal.
2. Click your name in the My Profile category.
3. Click Create new contact under the My Contacts category.
4. Enter the contact name, telephone numbers, and other information.
5. To specify the person as an emergency contact, check the Emergency contact box. The Priority field appears.
6. Select the priority of the contact, Primary or Alternate.
7. Click Save.

View the user directory
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_basic, or hr_manager

Corporate user directory refers to the records in the User [sys_user] table.

1. Navigate to HR - Administration Organization User Directory.
2. Click a user record to view or edit the Human Resources view of a user 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 HR cases for a user.
     • Users: Lists users managed by that user.

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_basic, 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 HR - Administration 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 HR profile and user records of an employee. The location of an HR agent can be used for automatic assignment of HR cases.

Role required: admin or hr_basic

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

1. Navigate to HR - Administration 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_basic

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

1. Navigate to HR - Administration 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 HR - Administration Catalog & Templates 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 HR - Administration 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 when it 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 6: 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 103.

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 HR - Administration Catalog & Templates Manage HR Skills.
Figure 7: 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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign a user</td>
<td>Click the user card. It is then highlighted in blue.</td>
</tr>
<tr>
<td>Unassign a user</td>
<td>Click the highlighted user card. Its highlight is</td>
</tr>
<tr>
<td></td>
<td>removed.</td>
</tr>
</tbody>
</table>

6. Click Save.

7. To assign other skills to a user, complete the following steps.
   a) Select All Users in the list on the left and locate the user on the right.
   b) Click the arrow next to Skills: # in the user card.
   c) Select the skills for the user, and click Save.

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

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

Assignment rules in HR

You can define rules to assign cases to specific users or groups automatically 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: If necessary, entry to customize the assignment rule further.

Assignment rules are applied only when an HR case is submitted and either no template was selected
or the selected template does not assign the Assignment group. 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.

- **HR - Administration 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.
- **HR - Administration Catalog & Templates HR Templates**: Look at the template that corresponds to the assignment rule to see what skills, if any, are required.
- **HR - Administration Catalog & Templates Manage HR Skills**: Find the HR user assigned to 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

Assignment rules are used to assign the HR group when it is not assigned from the catalog item template. You can create HR assignment rules as needed.

**Role required**: admin or hr_admin

1. Navigate to **HR - Administration Administration Assignment Rules**.
2. Click New. By default, the assignment rule is for the HR Task [hr_task] table.
3. Complete the form.

#### Table 22: Assignment Rules form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Descriptive name for the HR assignment rule.</td>
</tr>
<tr>
<td>Order</td>
<td>Order in which the rule processes. Rules with lower-order numbers are processed first. If a rule is applied, the 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. Assignment rule with order 200 states to assign the case to the group HR. If a group has the specified skill, then it is assigned. If not, then the second rule runs and assigns it to HR.</td>
</tr>
<tr>
<td>Application</td>
<td>Indicates global application scope.</td>
</tr>
<tr>
<td>Active</td>
<td>Check box that specifies the rule is in use.</td>
</tr>
<tr>
<td>Applies To</td>
<td>Table with the records that the assignment rule applies to. Default is the HR Task [hr_task] table.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conditions</td>
<td>Conditions in which the assignment rule applies.</td>
</tr>
<tr>
<td>Assign To</td>
<td>User to assign to the case when this rule is applied.</td>
</tr>
<tr>
<td>Applies To</td>
<td>Group to assign to the case when this rule is applied.</td>
</tr>
<tr>
<td>Script</td>
<td>Script to define advanced assignment rule functionality. Current.variable_pool set of variables is available.</td>
</tr>
</tbody>
</table>

**Note:** 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.

4. Click Update.

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

### Test an assignment rule

You can test a new assignment rule to verify that it works as intended.

**Role required:** admin or hr_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.

- HR - Administration 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.
- HR - Administration Catalog & Templates HR Templates: Look at the template that corresponds to the assignment rule to see what skills, if any, are required.
- HR - Administration Catalog & Templates Manage HR Skills: Find the HR user assigned to 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 and templates

HR catalog and templates contain the catalog items and templates 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 catalog items to use for other types of HR requests that are important to your organization. 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. 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 are often referred to one way in the navigator, but when you open the module the name at the top is different. The following list includes terms used for items associated with the HR catalog.

<table>
<thead>
<tr>
<th>Table 23: Synonymous HR Catalog terms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Term</strong></td>
</tr>
<tr>
<td>Catalog item</td>
</tr>
<tr>
<td>HR request</td>
</tr>
<tr>
<td>HR template</td>
</tr>
<tr>
<td>Knowledge article</td>
</tr>
</tbody>
</table>

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 Service Portal or HR Catalog.
- HR case categories, which are used for reporting and selected to assign a template to an HR case. Typically used when an HR agent is entering a case for a caller through HR - Case Management Case Management Create New Case.

Catalog item planning and creation

The following outlines a process to use when planning for and creating 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 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. You can then 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.

HR onboard and offboard task templates

HR onboard and offboard task templates contain the catalog items and templates that define the onboarding and offboarding tasks.

HR onboarding and offboarding task templates define the tasks for onboarding a new hire or offboarding an employee leaving the company.

- You can have multiple templates.
- The system prevents duplicated tasks.
- Conditions determine template assignment.
- Each template can have multiple conditions.
- If no conditions are defined, the template is assigned to every onboardeed or offboardeed employee.

Create or modify an offboarding task template

Offboarding task templates allow you to define assignment tasks for employees leaving the company.

Role required: hr_admin or hr_basic

You can create offboarding task templates or modify existing ones.

1. Navigate to HR - Administration Catalog & Templates Offbordiong Task Templates. The Task templates list opens and displays offboarding task templates.
2. Click New to create an offboarding template or open an existing template to modify.
3. The Task templates page opens.
4. Edit the fields as needed.

Table 24: HR task template fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Unique and descriptive name for this template.</td>
</tr>
<tr>
<td>Active</td>
<td>Check to activate the template.</td>
</tr>
<tr>
<td>HR Category</td>
<td>The group of HR catalog items associated with the offboarding task template.</td>
</tr>
<tr>
<td>Condition</td>
<td>Use the following to create conditions that when met, trigger the use of the offboarding task template. Default templates have the conditions left blank. Default templates are assigned to all offboardeed employees.</td>
</tr>
</tbody>
</table>
Field | Description
--- | ---
Add Filter Condition | Click after the first condition is defined to add more conditions. Skip to the choose field to create first condition.
And "OR" Clause | Click to create more conditions. Skip to the choose field to create first condition.
---choose field--- | Select a filter condition.
---oper--- | Select how to filter the condition
---value--- | Click and select a value defining the filter condition.
  • Location in --choose field--
  • is in --oper--
  • California in --value--
Creates a condition that assigns this template to all offboarded employees in California.

Description | Information about this offboarding task template.

5. Click the Form context header and Save to save the template and remain on the Task templates Onboarding page or Submit and return to the Task templates page.

6. To assign offboarding tasks, click Edit.

Table 25: HR task template fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add filter</td>
<td>Click to add more filters. To run one filter, go to --choose field--.</td>
</tr>
<tr>
<td>Run filter</td>
<td>Click after entering the filter criteria to narrow your search of tasks.</td>
</tr>
<tr>
<td>--choose field--</td>
<td>Select a filter to narrow your search of tasks.</td>
</tr>
<tr>
<td>--oper--</td>
<td>Select how to filter the condition.</td>
</tr>
<tr>
<td>--value--</td>
<td>Enter a value to filter. You can select Assignment group, is, and enter HR to display only tasks assigned to HR.</td>
</tr>
</tbody>
</table>

Collection | Select and move onboarding tasks to the right column. Tasks are defined in HR Templates.

7. Click Save and the Task templates page displays.
Create or modify an onboarding task template

Onboarding task templates allow you to define assignment tasks for onboarding new employees.

Role required: hr_admin or hr_basic

You can create onboarding task templates or modify existing ones.

1. Navigate to HR - Administration Catalog & Templates Onboarding Task Templates. Task Templates list opens and displays onboarding task templates.
2. Click New to create an onboarding task template or open an existing template to modify.
3. The Task templates page opens.
4. Edit the fields as needed.

Table 26: HR task template fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Unique and descriptive name for this template.</td>
</tr>
<tr>
<td>Active</td>
<td>Check to activate the template.</td>
</tr>
<tr>
<td>HR Category</td>
<td>The group of HR catalog items associated with the onboard template.</td>
</tr>
<tr>
<td>Condition</td>
<td>Use the following to create conditions that when met, trigger the use of the onboarding template. Default templates have the conditions left blank. Default templates are assigned to all onboarded employees.</td>
</tr>
<tr>
<td>Add Filter Condition</td>
<td>Click after the first condition is defined to add more conditions. Skip to the choose field to create first condition.</td>
</tr>
<tr>
<td>And &quot;OR&quot; Clause</td>
<td>Click to create more conditions. Skip to the choose field to create first condition.</td>
</tr>
<tr>
<td>--choose field--</td>
<td>Select a filter condition.</td>
</tr>
<tr>
<td>--oper--</td>
<td>Select how to filter the condition</td>
</tr>
<tr>
<td>--value--</td>
<td>Click and select a value defining the filter condition.</td>
</tr>
<tr>
<td>Description</td>
<td>Information about this onboarding task template.</td>
</tr>
</tbody>
</table>
5. Click the Form context header and Save to save the template and remain on the Task templates Onboarding page or Submit and return to the Task templates page.

6. To assign onboarding tasks, click Edit.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add filter</td>
<td>Click to add more filters. To run one filter, go to --choose field--.</td>
</tr>
<tr>
<td>Run filter</td>
<td>Click after entering the filter criteria to narrow your search of tasks.</td>
</tr>
<tr>
<td>--choose field--</td>
<td>Select a filter to narrow your search of tasks.</td>
</tr>
<tr>
<td>--oper--</td>
<td>Select how to filter the condition.</td>
</tr>
<tr>
<td>--value--</td>
<td>Enter a value to filter.</td>
</tr>
<tr>
<td></td>
<td>You can select Assignment group, is, and enter HR to display only tasks assigned to HR.</td>
</tr>
<tr>
<td>Collection</td>
<td>Select and move onboarding tasks to the right column.</td>
</tr>
<tr>
<td></td>
<td>Tasks are defined in HR Templates.</td>
</tr>
</tbody>
</table>

7. Click Save and the Task templates page displays.

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.

Role required: admin, hr_manager, or hr_admin

When you create an HR catalog category, assign a catalog item to the category to publish the new catalog category to the HR Service Portal and HR Catalog. An HR case category and HR case template are created automatically.

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

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

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.
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 HR - Administration Catalog & Templates Manage HR Catalog.
2. Select the HR category in the list on the left that contains the new catalog item.
3. Click New Catalog Item.
4. 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.
5. Select the Catalog category from the choice list.
6. Select the HR Assignment group to enable an HR agent to be auto-assigned when this catalog item is submitted.
7. Change the Priority to higher or lower when necessary.
8. Click Publish to save the catalog item and make it available for use immediately.
   When you click Submit, the catalog item is saved, but is not active. You can update it, for example 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.

When you want to customize the new, published catalog item, for example, to add variables, point and click the edit icon that appears. 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 116.

Add a knowledge article to an HR category item

You can add a knowledge article to an HR category item to help users access information pertaining to the category. For example, you can attach an article about the company dental benefits to the Dental Benefits category item.
Role required: admin, hr_manager, or hr_admin

1. The easiest way to add a knowledge article to a category item is to navigate to HR - Administration Catalog & Templates Manage HR Catalog.
2. Click the category item you want to add a knowledge article to, such as Dental Benefits. Three icons appear in the bottom right corner of the category item.
3. Click the Manage KB articles icon. The Catalog Item to KB Links list opens.
4. Click New to open the Catalog Item to KB Links new record form.
5. Fill in the required fields, using the reference lookup icon where available.

Table 28: Catalog Item to KB Links fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Descriptive name for the knowledge article. Can be the actual name of the article.</td>
</tr>
<tr>
<td>Catalog Item</td>
<td>Catalog item to link the knowledge article to, such as Dental Benefits.</td>
</tr>
<tr>
<td>Knowledge Article</td>
<td>Knowledge article to link to the catalog item, such as Dental Benefits Enrollment Form.</td>
</tr>
<tr>
<td>Managed Document</td>
<td>Controlled internal document, such as an insurance provider Dental Claim Form.</td>
</tr>
<tr>
<td>Active</td>
<td>Check box that specifies the category item is in use.</td>
</tr>
<tr>
<td>Order</td>
<td>Order in which the articles are processed in the list. Articles with lower-order numbers appear in the list first.</td>
</tr>
</tbody>
</table>

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 HR - Administration Catalog & Templates HR 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 29: HR case template fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Unique and descriptive name for this template.</td>
</tr>
<tr>
<td>Short description</td>
<td>Content that is copied into the Short description field of an HR request when this HR case template is used to submit an HR request from the associated catalog item.</td>
</tr>
<tr>
<td>Description</td>
<td>Detailed description copied into an HR request created from this template.</td>
</tr>
<tr>
<td>Checklist template</td>
<td>An informal list of questions or tasks used as a reminder for the HR agent working on this case.</td>
</tr>
<tr>
<td>Workflow</td>
<td>The workflow used to process an HR case from this template.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>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.</td>
</tr>
<tr>
<td>Skills</td>
<td>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.</td>
</tr>
<tr>
<td>Priority</td>
<td>The default priority when the HR request is created from this template.</td>
</tr>
<tr>
<td>Billable</td>
<td>Does not apply to HR cases.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspended reason</td>
<td>Information on why 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.</td>
</tr>
<tr>
<td></td>
<td>• User: Request additional user info</td>
</tr>
<tr>
<td></td>
<td>• Document: Request document</td>
</tr>
<tr>
<td></td>
<td>• Other, Company, Group: Suspend case</td>
</tr>
</tbody>
</table>

**Table 30: Task information**

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

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, and others may be added as you create HR case templates with associated HR tasks. You can modify any HR task template.

1. Navigate to HR - Administration Catalog & Templates HR 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 31: HR task template fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Task Template</td>
<td>The task template to use for this task, if any. Click the link, and then select the template from the choice list.</td>
</tr>
<tr>
<td>Task type</td>
<td>Type of task.</td>
</tr>
<tr>
<td>Name</td>
<td>Unique and descriptive name for this template.</td>
</tr>
<tr>
<td>Short description</td>
<td>Content that is copied into the Short description field of an HR task when this template is used.</td>
</tr>
<tr>
<td>Description</td>
<td>Information about this HR task template.</td>
</tr>
<tr>
<td>Checklist template</td>
<td>An informal list of questions or tasks used as a reminder for the HR agent working on this task.</td>
</tr>
<tr>
<td>Acknowledgement document</td>
<td>Document sent to employee as part of a data management task. Documents are created and maintained in Managed Documents or PDF Document Templates.</td>
</tr>
<tr>
<td>Estimated work duration</td>
<td>Estimated amount of time it takes to complete the task in days, hours, and minutes.</td>
</tr>
<tr>
<td>Acknowledgement type</td>
<td>Method of verification that a data management task was completed.</td>
</tr>
</tbody>
</table>
### Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign to opened for</td>
<td>Check to have task assigned to employee. Leave unchecked to have task assigned to HR.</td>
</tr>
<tr>
<td>Days due before start</td>
<td>The number of days before the start date of the employee being onboarded that the onboarding task is due.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>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.</td>
</tr>
</tbody>
</table>

4. 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 **HR - Administration 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. 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 1:1 relationship between HR case categories and HR catalog items.

The following HR case categories are predefined. Administrators can create 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 32: HR categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>401(k)</td>
<td>Ask about the 401(k) plan.</td>
<td>How much can I contribute from each paycheck?</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Beneficiaries</td>
<td>Manage your beneficiaries.</td>
<td>Decide who receives your insurance benefits should you die and what percentage should be distributed.</td>
</tr>
<tr>
<td>Career guidance</td>
<td>Ask a question regarding your career growth and opportunities.</td>
<td>What do I have to do to get a promotion to senior level?</td>
</tr>
<tr>
<td>Dental Benefits</td>
<td>Enroll, modify, or ask a question about your dental benefits.</td>
<td>Does my dental insurance cover braces?</td>
</tr>
<tr>
<td>Direct Deposit</td>
<td>Enroll, modify, or ask a question about direct deposit.</td>
<td>Can I deposit my paycheck into two different bank accounts?</td>
</tr>
<tr>
<td>Disciplinary Issue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee change</td>
<td>Ask for an update to the HR profile.</td>
<td>How do I change the status of an employee from temp to permanent?</td>
</tr>
<tr>
<td>Employee Information Change</td>
<td>Request an employee personal information change.</td>
<td>My status has changed from single to married.</td>
</tr>
<tr>
<td>Employee Offboarding</td>
<td>Request to offboard an employee.</td>
<td>How do I offboard an employee?</td>
</tr>
<tr>
<td>Employee relations</td>
<td>Ask an employee relations question.</td>
<td>What should I do about two employees constantly arguing?</td>
</tr>
<tr>
<td>Employment verification</td>
<td>Request a verification of employment.</td>
<td>I need verification of employment for my loan.</td>
</tr>
<tr>
<td>Employment Verification Letter</td>
<td>Request an employment verification letter.</td>
<td>I need a letter sent to my bank to verify employment for my loan.</td>
</tr>
<tr>
<td>General</td>
<td>Ask a general question for which a specific record producer does not exist.</td>
<td>Does the company organize an end-of-year party for its employees?</td>
</tr>
<tr>
<td>Grievance</td>
<td>File a grievance complaint.</td>
<td>My office mate talks on the speaker phone and I cannot concentrate on my work.</td>
</tr>
<tr>
<td>HR Password Reset</td>
<td>Request password reset for an HR system.</td>
<td>I need my HR password reset.</td>
</tr>
<tr>
<td>HR Portal Support</td>
<td>Ask a question about the HR portal or request HR Portal support.</td>
<td>I have a technical issue.</td>
</tr>
<tr>
<td>HR System Access</td>
<td>Request or modify access to HR systems.</td>
<td>I need access to a particular system.</td>
</tr>
<tr>
<td>HR System Reports</td>
<td>Request or ask a question about an HR report.</td>
<td>I need access to a particular report.</td>
</tr>
<tr>
<td>Leave</td>
<td>Request a leave of absence.</td>
<td>How do I arrange for paternity leave?</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Leave General Question</td>
<td>Ask a general question about taking time off that is not vacation.</td>
<td>What are the approved reasons for taking a leave of absence?</td>
</tr>
<tr>
<td>Life events</td>
<td>Ask a life events and benefits question.</td>
<td>How do I change my name in the system after getting married?</td>
</tr>
<tr>
<td>Medical/dental/ vision</td>
<td>Ask an insurance question.</td>
<td>Can I add my spouse to the vision plan?</td>
</tr>
<tr>
<td>Medical Benefits</td>
<td>Enroll, modify, or ask a question about your medical benefits.</td>
<td>Does my medical insurance cover me if I am on vacation in another country?</td>
</tr>
<tr>
<td>New Hire Onboarding</td>
<td>Request to onboard an employee.</td>
<td>Please onboard a new employee.</td>
</tr>
<tr>
<td>Offboarding</td>
<td>Complete tasks to close a terminating employee’s accounts and retrieve company assets.</td>
<td>An employee resigns.</td>
</tr>
<tr>
<td>Onboarding</td>
<td>Complete tasks to set up accounts for a new employee and provide company assets, such as a computer.</td>
<td>A new employee is hired.</td>
</tr>
<tr>
<td>Pay Discrepancy</td>
<td>Ask about or report a discrepancy in your paycheck.</td>
<td>Why is my paycheck less this pay period?</td>
</tr>
<tr>
<td>Payroll</td>
<td>Ask a question about payroll or salary.</td>
<td>On what day of the month does my account get credited?</td>
</tr>
<tr>
<td>Pharmacy Benefits</td>
<td>Enroll, modify, or ask a question about your pharmacy benefits.</td>
<td>Can I get name brand medications or does my benefit only include generic when available?</td>
</tr>
<tr>
<td>Retirement</td>
<td>Ask about retirement benefits.</td>
<td>What is the minimum age at which I can retire?</td>
</tr>
<tr>
<td>Retirement 401(k)</td>
<td>Ask a 401(k) related retirement question.</td>
<td>If I am planning to retire, should I scale back my 401(k) contribution?</td>
</tr>
<tr>
<td>Tuition</td>
<td>Ask a question about tuition.</td>
<td>Will I be reimbursed for training tuition?</td>
</tr>
<tr>
<td>Tuition Reimbursement</td>
<td>Request tuition reimbursement.</td>
<td>Please reimburse me for the class I just completed.</td>
</tr>
<tr>
<td>Vacation</td>
<td>Ask a vacation question.</td>
<td>When will I begin to earn more vacation per year?</td>
</tr>
<tr>
<td>Vision Benefits</td>
<td>Enroll, modify, or ask a question about your vision benefits.</td>
<td>How many pairs of glasses can I buy per year as part of the benefit?</td>
</tr>
</tbody>
</table>
HR PDF document templates

HR document templates are used to generate PDF documents that include information from an employee's HR profile. You can generate PDF employment verification letters for existing employees. You configure PDF document templates with your company information and logo.

You can configure multiple PDF document templates, for example, if you have different letters for different countries. The following templates are predefined.

- Employee Verification Letter in Canada
- Employee Verification Letter in USA

Before you begin generating documents you need to configure the templates with your company logo and text. It is recommended that you obtain the following items and information to configure the predefined HR document templates, or to create new ones.

- A page of your company's letterhead.
- Copies of your current employment verification letter and offer letter templates, if available.
- The logo image to use in your header. The header image can be a maximum of 50px 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 15px high. You can configure both an image and text in the footer.

Modify an HR PDF document template

You can modify the predefined HR PDF document templates with your company logo and custom text.

Role required: admin, hr_manager, or hr_admin

Each PDF document template contains configurable areas for the header, body, and footer. You can enter the body of the letter in a WYSIWYG text editor, and place variables to retrieve information from the employee's or candidate's HR profile.

1. Navigate to HR - Administration Catalog & Templates PDF Document Templates.
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 choice 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 document template.
   b) Add any additional variables as needed. The following list contains all variables that you can add.

<table>
<thead>
<tr>
<th>(Date)</th>
<th>(Email)</th>
<th>(Department)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Name)</td>
<td>(Work phone)</td>
<td>(Employee number)</td>
</tr>
<tr>
<td>(Position)</td>
<td>(Prefix)</td>
<td>(Employment status)</td>
</tr>
<tr>
<td>(Time type)</td>
<td>(Nationality)</td>
<td>(Employment type)</td>
</tr>
<tr>
<td>(Employment start date)</td>
<td>(Manager)</td>
<td>(Gender)</td>
</tr>
<tr>
<td>(New Employee)</td>
<td>(New Employee Address)</td>
<td>(Position Title)</td>
</tr>
</tbody>
</table>
To modify the list of available variables, edit the generalhrform script include.

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

<table>
<thead>
<tr>
<th>Format the text</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an image</td>
<td>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.</td>
</tr>
</tbody>
</table>

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 associated catalog item. You must impersonate the user assigned to work on the case to generate the letter within the HR case. Continue editing and testing the letter template until you are satisfied with the generated PDF.

Add an HR PDF document template

You can add HR pdf document templates for employment verification or job offers as needed.

Role required: admin, hr_manager, or hr_admin

The easiest way to add a new HR PDF document template is to open one of the existing templates and save it as a new template.

1. Navigate to HR - Administration Catalog & Templates PDF Document Templates.
2. Open one of the HR PDF document templates of the type that you want to add.
3. Enter a new name.
4. Right-click the form header and select Insert and Stay.
   The new HR PDF document template is saved and the page refreshes with the new name.
5. Perform any of the following actions to modify the template.
   For more information about updating the form sections, see Modify an HR PDF document template on page 123.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Update the header logo</strong></td>
<td>Select a new image and position, as needed.</td>
</tr>
<tr>
<td><strong>Update the text</strong></td>
<td>Enter and format the text in the Body.</td>
</tr>
<tr>
<td></td>
<td>Use the formatting tools in the Body to apply formatting options, such as</td>
</tr>
<tr>
<td></td>
<td>bold, italic, underline, font styling.</td>
</tr>
<tr>
<td></td>
<td>The body is a place holder for HTML text and tokenized variables. When the</td>
</tr>
<tr>
<td></td>
<td>PDF is generated, the variables are resolved before sending it to the PDF</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Currently, there is no support for style tags to align text left</td>
</tr>
<tr>
<td></td>
<td>or right. Space indentation must be used. Jelly and CSS Styling are not</td>
</tr>
<tr>
<td></td>
<td>supported.</td>
</tr>
<tr>
<td><strong>Update the footer</strong></td>
<td>Select a new footer image and its position, as needed. Modify the text if</td>
</tr>
<tr>
<td></td>
<td>necessary.</td>
</tr>
<tr>
<td><strong>Change the page size</strong></td>
<td>Select the page size from the choice list.</td>
</tr>
</tbody>
</table>

**HR PDF document template variables:**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>{{Date}}</td>
<td>Date</td>
</tr>
<tr>
<td>{{Work email}}</td>
<td>Work email</td>
</tr>
<tr>
<td>{{Department}}</td>
<td>Department</td>
</tr>
<tr>
<td>{{Name}}</td>
<td>Name</td>
</tr>
<tr>
<td>{{Work phone}}</td>
<td>Work phone</td>
</tr>
<tr>
<td>{{Employee number}}</td>
<td>Employee number</td>
</tr>
<tr>
<td>{{Position}}</td>
<td>Position</td>
</tr>
<tr>
<td>{{Prefix}}</td>
<td>Prefix</td>
</tr>
<tr>
<td>{{Employment status}}</td>
<td>Employment status</td>
</tr>
<tr>
<td>{{Time type}}</td>
<td>Time type</td>
</tr>
<tr>
<td>{{Nationality}}</td>
<td>Nationality</td>
</tr>
<tr>
<td>{{Employment type}}</td>
<td>Employment type</td>
</tr>
<tr>
<td>{{Employment start date}}</td>
<td>Employment start date</td>
</tr>
<tr>
<td>{{Manager}}</td>
<td>Manager</td>
</tr>
<tr>
<td>{{Gender}}</td>
<td>Gender</td>
</tr>
<tr>
<td>{{New Employee}}</td>
<td>New Employee</td>
</tr>
<tr>
<td>{{New Employee Address}}</td>
<td>New Employee Address</td>
</tr>
<tr>
<td>{{Position Title}}</td>
<td>Position Title</td>
</tr>
<tr>
<td>{{New Employee Last Name}}</td>
<td>New Employee Last Name</td>
</tr>
<tr>
<td>{{Position Type}}</td>
<td>Position Type</td>
</tr>
<tr>
<td>{{Start Date}}</td>
<td>Start Date</td>
</tr>
<tr>
<td>{{Hiring Manager}}</td>
<td>Hiring Manager</td>
</tr>
<tr>
<td>{{Yearly Compensation}}</td>
<td>Yearly Compensation</td>
</tr>
<tr>
<td>{{Overtime Pay Rate}}</td>
<td>Overtime Pay Rate</td>
</tr>
<tr>
<td>{{Bonus}}</td>
<td>Bonus</td>
</tr>
<tr>
<td>{{Number of RSUs}}</td>
<td>Number of RSUs</td>
</tr>
<tr>
<td>{{HR Manager}}</td>
<td>HR Manager</td>
</tr>
<tr>
<td>{{HR Manager Title}}</td>
<td>HR Manager Title</td>
</tr>
<tr>
<td>{{Signature}}</td>
<td>Signature</td>
</tr>
<tr>
<td>{{Start Date}}</td>
<td>Start Date</td>
</tr>
</tbody>
</table>

6. **Click Update.**

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

**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 Connect Support Support Administration Queues.
2. Select HR Department Chat Queue from the Chat Queues list.
3. Fill in the fields, as appropriate.

<table>
<thead>
<tr>
<th>Table 33: Chat Queue form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field</strong></td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Active</td>
</tr>
<tr>
<td>Assignment group</td>
</tr>
<tr>
<td>Average wait time</td>
</tr>
<tr>
<td>Confirm problem</td>
</tr>
<tr>
<td>Escalate to</td>
</tr>
<tr>
<td>Initial agent response</td>
</tr>
<tr>
<td>Not available</td>
</tr>
<tr>
<td>Question</td>
</tr>
<tr>
<td>Field</td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td>Schedule</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>How long the user waited and the result</td>
<td>Review information in the State and Wait time columns.</td>
</tr>
<tr>
<td>Who is actively helping employees in the queue</td>
<td>Review the names of agents in the Assigned to column.</td>
</tr>
</tbody>
</table>

**HR benefits**

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

The HR Benefits module contains a list of all open benefits cases and allows HR agents to enroll employees in the company benefit plans. HR agents can add and modify benefit providers and benefit types. Tuition reimbursement cases are managed through the HR Benefits module.

The following information is set up and maintained as part of the HR Benefits module. Employees can access HR benefits information and submit HR benefits cases from the HR Service Portal. HR managers or administrators set up and modify the information.

- HR Benefits Case Management
- HR Benefits
  - Beneficiaries
  - Dental benefits
  - Medical benefits
  - Pharmacy benefits
  - Retirement benefits
  - Vision benefits
- Benefit Providers and Types
- Tuition Reimbursements

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

- Create HR benefits cases for employees to record the processing of HR requests, such as a request from an employee for tuition reimbursement or a request for information about a benefit.
- Create HR cases for automated HR processes, such as employee medical insurance enrollment.
- View HR benefits case information and manage the overall HR workload. For example, a manager can work with all HR cases that are not assigned.

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

You can use HR dashboards, reports, and other HR management modules to monitor and manage HR benefits cases.

You can view a list of all benefits cases in the HR - Benefits Case Management Benefits Cases module.

You can view a list of tuition reimbursement cases in the HR - Benefits Tuition Reimbursements module.

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

- Dashboards, including the Overview, Overview (Reporting), and Manager Dashboard. Dashboards are a type of homepage containing reports and other widgets. You click a listed benefit record or a segment in a report to see details.
- HR reports, including reports available on the dashboards. Various HR reports are predefined for you, and you can create additional reports.

Create or modify a beneficiary

You can create, add, or modify an employee beneficiary using the HR Benefits module.

Role required: hr_basic, or hr_manager

Employees request to create, add, or modify a beneficiary to a particular benefit plan by submitting a request through the HR Service Portal. A beneficiaries case is opened and can be viewed and managed at HR - Benefits Case Management. Once a beneficiary is added to the HR application, HR agents can add the beneficiary to an employee benefit record using the lookup icon.

1. Navigate to HR - Benefits Benefits Beneficiaries.
   The HR Beneficiaries list opens.
2. Click New to open a beneficiary record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

Table 34: HR Beneficiary form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name</td>
<td>Full name of the beneficiary.</td>
</tr>
<tr>
<td>SSN</td>
<td>Social security number of the beneficiary.</td>
</tr>
<tr>
<td>Relation to employee</td>
<td>Relationship to the employee.</td>
</tr>
<tr>
<td>Date of birth</td>
<td>Beneficiary birth date.</td>
</tr>
<tr>
<td>Percentage</td>
<td>Percentage amount of the benefit distributed to the beneficiary.</td>
</tr>
<tr>
<td>Benefit type</td>
<td>Type of benefit, such as, 401(k), Basic Life, Retirement Plan, or Voluntary Life.</td>
</tr>
<tr>
<td>Beneficiary contact</td>
<td>Beneficiary contact information if available.</td>
</tr>
<tr>
<td>Beneficiary type</td>
<td>Primary or contingent.</td>
</tr>
<tr>
<td>Employee</td>
<td>The user who submitted the case. Click the lookup icon and select the user.</td>
</tr>
</tbody>
</table>
4. **Click Submit.**
   The beneficiary is listed in the HR Beneficiaries list.

5. **To modify beneficiary data, find the existing beneficiary in the HR Beneficiaries list.**
   You can use the list search menu by typing the beneficiary name and pressing Enter. You can also search on the employee name the same way.

6. **Click the beneficiary name to open the form.**
   The HR Beneficiary form opens displaying full name and other populated fields.

7. **Modify the form.**

8. **Click Update.**

### Create or modify a dental benefit

You can add or modify a dental benefit for an employee using the HR Benefits module.

**Role required:** hr_basic, or hr_manager

Employees can ask questions about dental benefits and request to enroll in a dental insurance plan by submitting a request through the HR Service Portal. A dental benefits case is opened and can be viewed and managed at **HR - Benefits Case Management**.

1. **Navigate to HR - Benefits Benefits Dental Benefits.**
   The HR Dental Benefits list opens.

2. **Click New to open a dental benefits record.**

3. **Complete the form.** (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the benefit.</td>
</tr>
<tr>
<td>Employee</td>
<td>The user who requested enrollment. Click the lookup icon and select the user.</td>
</tr>
<tr>
<td>Provider</td>
<td>Insurance provider.</td>
</tr>
<tr>
<td>Details</td>
<td>Any details about the benefit.</td>
</tr>
<tr>
<td>Paycheck deduction amount</td>
<td>Dollar amount deducted from the employee paycheck toward the benefit.</td>
</tr>
<tr>
<td>Beneficiaries</td>
<td>Family members eligible for the benefit.</td>
</tr>
<tr>
<td>Start date</td>
<td>Date when the benefit is active for the employee and beneficiaries.</td>
</tr>
</tbody>
</table>

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4. Click Submit.
The dental benefit is listed in the HR Dental Benefits list.

5. To modify dental benefit data, find the existing dental benefit in the HR Dental Benefits list.
   You can use the list search menu by typing the employee name and pressing Enter.

6. Click the dental benefit to open the form.
The HR Dental Benefit form opens displaying benefit name and other populated fields.

7. Modify the form.
8. Click Update.

Create or modify a medical benefit

You can add or modify a medical benefit for an employee using the HR Benefits module.

Role required: hr_basic, or hr_manager

Employees can ask questions about medical benefits and request to enroll in a medical insurance plan by submitting a request through the HR Service Portal. A medical benefits case is opened and can be viewed and managed at HR - Benefits Case Management.

1. Navigate to HR - Benefits Benefits Medical Benefits.
The HR Medical Benefits list opens.

2. Click New to open a medical benefits record.

3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

Table 36: HR Medical Benefit form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the benefit.</td>
</tr>
<tr>
<td>Employee</td>
<td>The user who requested enrollment. Click the lookup icon and select the user.</td>
</tr>
<tr>
<td>Provider</td>
<td>Insurance provider.</td>
</tr>
<tr>
<td>Enrollment form</td>
<td>Managed document employee uses to enroll in the benefit.</td>
</tr>
<tr>
<td>Details</td>
<td>Any details about the benefit.</td>
</tr>
<tr>
<td>Paycheck deduction amount</td>
<td>Dollar amount deducted from the employee paycheck toward the benefit.</td>
</tr>
<tr>
<td>Beneficiaries</td>
<td>Family members eligible for the benefit.</td>
</tr>
<tr>
<td>Start date</td>
<td>Date when the benefit is active for the employee and beneficiaries.</td>
</tr>
<tr>
<td>End date</td>
<td>Date when the benefit is no longer active for the employee and beneficiaries.</td>
</tr>
</tbody>
</table>
4. Click Submit.  
The medical benefit is listed in the HR Medical Benefits list.

5. To modify medical benefit data, find the existing medical benefit in the HR Medical Benefits list.  
You can use the list search menu by typing the employee name and pressing Enter.

6. Click the medical benefit to open the form.  
The HR Medical Benefit form opens displaying benefit name and other populated fields.

7. Modify the form.

8. Click Update.

Create or modify a pharmacy benefit

You can add or modify a pharmacy benefit for an employee using the HR Benefits module.

Role required: hr_basic, or hr_manager

Employees can ask questions about pharmacy benefits and request to enroll in a pharmacy benefit plan by submitting a request through the HR Service Portal. A pharmacy benefits case is opened and can be viewed and managed at HR - Benefits Case Management.

1. Navigate to HR - Benefits Benefits Pharmacy Benefits.  
The HR Pharmacy Benefits list opens.

2. Click New to open a pharmacy benefits record.

3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Table 37: HR Pharmacy Benefit form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field</strong></td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Employee</td>
</tr>
<tr>
<td>Provider</td>
</tr>
<tr>
<td>Details</td>
</tr>
<tr>
<td>Paycheck deduction amount</td>
</tr>
<tr>
<td>Beneficiaries</td>
</tr>
<tr>
<td>Start date</td>
</tr>
<tr>
<td>End date</td>
</tr>
</tbody>
</table>

4. Click Submit.  
The pharmacy benefit is listed in the HR Pharmacy Benefits list.

5. To modify pharmacy benefit data, find the existing pharmacy benefit in the HR Pharmacy Benefits list.  
You can use the list search menu by typing the employee name and pressing Enter.

6. Click the Pharmacy benefit to open the form.  
The HR Pharmacy Benefit form opens displaying benefit name and other populated fields.
7.  Modify the form.
8.  Click Update.

Create or modify a retirement benefit

You can add or modify a retirement benefit for an employee using the HR Benefits module.

Role required: hr_basic, or hr_manager

Employees can ask questions about retirement benefits and request to enroll in a retirement benefit plan by submitting a request through the HR Service Portal. A retirement benefits case is opened and can be viewed and managed at HR - Benefits Case Management.

1.  Navigate to HR - Benefits Benefits Retirement Benefits.
   The HR Retirement Benefits list opens.
2.  Click New to open a retirement benefit record.
3.  Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the benefit.</td>
</tr>
<tr>
<td>Employee</td>
<td>The user who requested enrollment. Click the lookup icon and select the user.</td>
</tr>
<tr>
<td>Provider</td>
<td>Benefit provider.</td>
</tr>
<tr>
<td>Details</td>
<td>Any details about the benefit.</td>
</tr>
<tr>
<td>Paycheck deduction amount</td>
<td>Dollar amount deducted from the employee paycheck toward the benefit.</td>
</tr>
<tr>
<td>Paycheck deduction percent</td>
<td>Percentage deducted from the employee paycheck toward the benefit.</td>
</tr>
<tr>
<td>Balance</td>
<td>Amount of currency in the benefit account.</td>
</tr>
<tr>
<td>Contributions</td>
<td>Employer match contributions.</td>
</tr>
<tr>
<td>Beneficiaries</td>
<td>Family members eligible for the benefit.</td>
</tr>
<tr>
<td>Start date</td>
<td>Date when the benefit is active for the employee and beneficiaries.</td>
</tr>
<tr>
<td>End date</td>
<td>Date when the benefit is no longer active for the employee and beneficiaries.</td>
</tr>
</tbody>
</table>

4.  Click Submit.
   The retirement benefit is listed in the HR Retirement Benefits list.
5.  To modify retirement benefit data, find the existing retirement benefit in the HR Retirement Benefits list.
   You can use the list search menu by typing the employee name and pressing Enter.
6.  Click the retirement benefit to open the form.
   The HR Retirement Benefits form opens displaying benefit name and other populated fields.
7.  Modify the form.
8. Click Update.

Create or modify a vision benefit

You can add or modify a retirement benefit for an employee using the HR Benefits module.

Role required: hr_basic, or hr_manager

Employees can ask questions about vision benefits and request to enroll in a vision benefit plan by submitting a request through the HR Service Portal. A vision benefits case is opened and can be viewed and managed at HR - Benefits Case Management.

2. Click New to open a vision benefit record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

Table 39: HR Vision Benefit form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the benefit.</td>
</tr>
<tr>
<td>Employee</td>
<td>The user who requested enrollment. Click the lookup icon and select the user.</td>
</tr>
<tr>
<td>Provider</td>
<td>Benefit provider.</td>
</tr>
<tr>
<td>Details</td>
<td>Any details about the benefit.</td>
</tr>
<tr>
<td>Paycheck deduction amount</td>
<td>Dollar amount deducted from the employee paycheck toward the benefit.</td>
</tr>
<tr>
<td>Beneficiaries</td>
<td>Family members eligible for the benefit.</td>
</tr>
<tr>
<td>Start date</td>
<td>Date when the benefit is active for the employee and beneficiaries.</td>
</tr>
<tr>
<td>End date</td>
<td>Date when the benefit is no longer active for the employee and beneficiaries.</td>
</tr>
</tbody>
</table>

4. Click Submit. The vision benefit is listed in the HR Vision Benefits list.
5. To modify vision benefit data, find the existing vision benefit in the HR Vision Benefits list.
   You can use the list search menu by typing the employee name and pressing Enter.
6. Click the vision benefit to open the form.
   The HR Vision Benefits form opens displaying benefit name and other populated fields.
7. Modify the form.
8. Click Update.

HR benefit providers

You can use HR Benefit Providers to maintain and add benefit providers and benefit types to the HR application.
The HR Benefits module contains a list of all benefit providers and types of benefits. HR agents can add and modify benefit providers and types.

The following information is set up and maintained as part of the HR Benefits Benefit Providers module.

- **HR Benefits Providers**
  - Dental benefit providers
  - Medical benefit providers
  - Pharmacy benefit providers
  - Retirement benefit providers, such as 401(k) or IRA
  - Vision benefit providers
  - Voluntary life benefit providers
  - Short-term disability benefit providers
  - Long-term disability
  - Basic life benefit providers

- **HR Benefits Types**
  - Dental
  - Medical
  - Pharmacy
  - Retirement
  - Vision
  - Voluntary life
  - Short-term disability
  - Long-term disability
  - Basic life

**Create or modify a benefit provider**

You can add or modify a benefit provider using the HR Benefit Providers module.

Role required: hr_basic, or hr_manager

Benefit providers can be viewed at HR - Benefits Benefit Providers HR Benefit Providers.

1. Navigate to HR - Benefits Benefit Providers HR Benefits Providers. The HR Benefit Providers list opens.
2. Click New to open an HR benefit provider record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Table 40: HR Benefit Provider form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field</strong></td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Provider</td>
</tr>
<tr>
<td>Plan type</td>
</tr>
</tbody>
</table>
Create or modify a benefit type

You can add or modify a benefit type using the HR Benefit Providers module.

Role required: hr_basic, or hr_manager

Benefit types can be viewed at HR - Benefits Benefit Providers HR Benefit Types.

1. Navigate to HR - Benefits Benefit Providers Benefits Types.
   The HR Benefit Types list opens.
2. Click New to open an HR benefit type record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

```
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The type of benefit, such as medical, dental, pharmacy.</td>
</tr>
<tr>
<td>Value</td>
<td>Value name of benefit, such as pharmacy or medical.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate a plan provider in the system. Leaving the box empty or</td>
</tr>
<tr>
<td></td>
<td>deseleting deactivates a provider in the system.</td>
</tr>
<tr>
<td>Benefit class</td>
<td>Table name of benefit, such as sn_hr_sp_pharmacy_benefit</td>
</tr>
</tbody>
</table>
```

4. Click Submit.
   The benefit type is listed in the HR Benefit Types list.
5. To modify benefit type data, find the existing benefit type in the Benefit Types list.
You can use the list search menu by typing the benefit type name or benefit value name and pressing Enter.

6. Click the benefit type to open the form.
The HR Benefit Type form opens displaying benefit type name and other populated fields.

7. Modify the form.
8. Click Update.

HR tuition reimbursements

You can maintain and manage tuition reimbursement cases for an employee using the HR Benefits module.
The HR Benefits module contains a list of all tuition reimbursement cases. HR agents can add and modify tuition reimbursement cases.

Create or modify tuition reimbursement

You can add or modify a tuition reimbursement for an employee using the HR Benefits module.

Role required: hr_basic, or hr_manager

Employees can ask questions about approved courses and classes and request tuition reimbursement by submitting a request through the HR Service Portal. A tuition reimbursement case is opened and can be viewed and assigned at HR - Benefits Tuition Reimbursements.

1. Navigate to HR - Benefits Tuition Reimbursements.
The HR Tuition Reimbursements list opens.

2. Click New to open an HR tuition reimbursement record.

3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course title</td>
<td>The name of the course.</td>
</tr>
<tr>
<td>Employee</td>
<td>The user who requested tuition reimbursement. Click the lookup icon and select the user.</td>
</tr>
<tr>
<td>School/Program name</td>
<td>Name of the school or program where the employee took the course.</td>
</tr>
<tr>
<td>Course grade</td>
<td>Grade the employee received after completing the course.</td>
</tr>
<tr>
<td>Course justification</td>
<td>Explanation of why the employee took the course.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the reimbursement request, such as Approved or Paid.</td>
</tr>
<tr>
<td>Course start date</td>
<td>Date when the course started.</td>
</tr>
<tr>
<td>Course end date</td>
<td>Date when the course ended.</td>
</tr>
<tr>
<td>Course cost</td>
<td>Cost of the course.</td>
</tr>
</tbody>
</table>
4. Click Submit.
The tuition reimbursement is listed in the HR Tuition Reimbursements list.

5. To modify tuition reimbursement data, find the existing tuition reimbursement in the HR Tuition Reimbursements list.
   You can use the list search menu by typing the course title or employee name and pressing Enter.

6. Click the tuition reimbursement to open the form.
The HR Tuition Reimbursement form opens displaying course title and other populated fields.

7. Modify the form.
8. Click Update.

### Approve a tuition reimbursement request

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

Role required: hr_basic or hr_approver_user

The employee who submits the request attaches the payment receipt and grades to the tuition form using the HR Service Portal. 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. 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.

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

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_basic 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 HR - Case Management 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.

HR employee relations

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

The HR Employee Relations module contains a list of all open employee relations cases. The module allows HR agents to add and modify disciplinary issues and types, as well as warning types.

The following information is set up and maintained as part of the HR Employee Relations module. Employees can access HR employee relations information and submit HR employee relations cases from the HR Service Portal. HR managers or administrators set up and modify the information.

- HR Employee Relations Case Management
- Disciplinary Issues
  - Disciplinary Issue Types
  - Warning Types

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

- Create HR employee relations cases for employees to record the processing of HR disciplinary issues, such as a report from an employee about an absent co-worker or co-worker misconduct.
- View HR employee relations case information and manage the overall HR workload. For example, a manager can work with all HR cases that are not assigned.

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

Employee relations case management

You can use HR dashboards, reports, and other HR management modules to monitor and manage HR employee relations cases.

You can view a list of employee relations cases in the HR - Employee Relations Case Management Employee Relations Cases module.

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

- Dashboards, including the Overview, Overview (Reporting), and Manager Dashboard. Dashboards are a type of homepage containing reports and other widgets. You click a listed employee relations record or a segment in a report to see details.
• HR reports, including reports available on the dashboards. Various HR reports are predefined for you, and you can create additional reports.

Create or modify a disciplinary issue

You can add or modify a disciplinary issue for an employee using the HR Employee Relations module.

Role required: hr_basic, or hr_manager

Employees can ask employee relations questions or report disciplinary issues by submitting questions and reports through the HR Service Portal. An employee relations case is opened and can be viewed and managed at HR - Employee Relations Case Management Employee Relations Cases.

Not every employee relations case results in a disciplinary issue. However, when a case does result in a disciplinary issue, a disciplinary issue is added to the Disciplinary Issue list.

1. Navigate to HR - Employee Relations Disciplinary Issues Disciplinary Issues.
   The HR Disciplinary Issue list opens.
2. Click New to open a disciplinary issue record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

   Table 43: HR Disciplinary Issue form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>The user to be disciplined.</td>
</tr>
<tr>
<td>Type</td>
<td>The disciplinary issue, such as tardiness, improper dress, or misconduct.</td>
</tr>
<tr>
<td>Warning Type</td>
<td>The warning given, such as verbal or written warning.</td>
</tr>
<tr>
<td>Description</td>
<td>Details about the disciplinary issue.</td>
</tr>
<tr>
<td>Disciplinary action</td>
<td>Action taken by HR or management.</td>
</tr>
<tr>
<td>Previous interactions</td>
<td>Details regarding other interactions with the employee.</td>
</tr>
<tr>
<td>Suggested improvement</td>
<td>Details about how to correct or better the issue.</td>
</tr>
<tr>
<td>Review date</td>
<td>Date the disciplinary issue is created or modified.</td>
</tr>
</tbody>
</table>

4. Click Submit.
   The disciplinary issue is listed in the HR Disciplinary Issue list.
5. To modify disciplinary issue data, find the existing disciplinary issue in the HR Disciplinary Issue list.
   You can use the list search menu by typing the employee name and pressing Enter.
6. Click the disciplinary issue to open the form.
   The HR Disciplinary Issue form opens displaying employee name and other populated fields.
7. Modify the form.
8. Click Update.
Create or modify a disciplinary issue type

You can add or modify a disciplinary issue type using the HR Employee Relations module.

Role required: hr_basic, or hr_manager.

Disciplinary issue types can be viewed at HR - Employee Relations Disciplinary Issues Disciplinary Issue Types.

Types of disciplinary issues include:

- Absenteeism
- Abusive Language or Behavior
- Improper Dress
- Misconduct
- Insubordination
- Tardiness
- Improper Use of Equipment
- Unsatisfactory Work Performance
- Failure to Follow Corporate Policy
- Other

1. Navigate to HR - Employee Relations Disciplinary Issues Disciplinary Issues Types. The HR Disciplinary Issue Types list opens.
2. Click New to open a disciplinary issue type record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue</td>
<td>The disciplinary issue.</td>
</tr>
<tr>
<td>Order</td>
<td>Number set to indicate the order in which the issue appears on the record.</td>
</tr>
<tr>
<td>Value</td>
<td>Issue value name, such as absenteeism, or improper_dress.</td>
</tr>
</tbody>
</table>

4. Click Submit. The disciplinary issue type is listed in the HR Disciplinary Issue Types list.
5. To modify disciplinary issue type data, find the existing disciplinary issue type in the HR Disciplinary Issue Types list.
   You can use the list search menu by typing the disciplinary issue type and pressing Enter.
6. Click the disciplinary issue type to open the form.
   The HR Disciplinary Issue Type form opens displaying the issue and other populated fields.
7. Modify the form.
8. Click Update.
Create or modify a disciplinary warning type

You can add or modify a disciplinary warning type using the HR Benefits module.
Role required: hr_basic, or hr_manager

Disciplinary warning types can be viewed at HR - Employee Relations Disciplinary Issues Warning Types.

Types of disciplinary warnings include:
- Verbal Warning
- Written Warning
- Final Warning
- Dismissal
- Other

1. Navigate to HR - Employee Relations Disciplinary Issues Warning Types.
   The HR Disciplinary Warning Types list opens.
2. Click New to open a disciplinary issue type record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warning</td>
<td>Warning type.</td>
</tr>
<tr>
<td>Order</td>
<td>Number set to indicate the order in which the issue appears on the record.</td>
</tr>
<tr>
<td>Value</td>
<td>Issue value name, such as absenteeism, or improper_dress.</td>
</tr>
</tbody>
</table>

4. Click Submit.
   The disciplinary warning type is listed in the HR Disciplinary Warning Types list.
5. To modify disciplinary warning type data, find the existing disciplinary warning type in the HR Disciplinary Warning Types list.
   You can use the list search menu by typing the disciplinary warning type and pressing Enter.
6. Click the disciplinary warning type to open the form.
   The HR Disciplinary Warning Type form opens displaying the warning type and other populated fields.
7. Modify the form.
8. Click Update.

HR systems

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

HR Systems comprises the individual systems that form the HR application.
- Benefits Administration System
- HR Portal
• Learning Management System
• Payroll System
• Performance Management System
• Time and Attendance System

The HR Systems module contains a list of all open HR systems cases. HR agents can grant operational access to systems and create and modify systems reports.

The following information is set up and maintained as part of the HR Systems module. Employees can access HR systems information and submit HR systems cases from the HR Service Portal. HR managers or administrators set up and modify the information.

• HR Password Reset
• HR Portal Support
• HR System Access
• HR System Reports

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

• Create HR systems cases for employees to record the processing of HR systems requests, such as an HR password reset or HR Service Portal support.
• View HR systems case information and manage the overall HR workload. For example, a manager can work with all HR cases that are not assigned.

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

**HR systems case management**

You can use HR dashboards, reports, and other HR management modules to monitor and manage HR systems cases.

You can view a list of all systems cases in the HR - Systems Case Management HR Systems Cases module.

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

• Dashboards, including the Overview, Overview (Reporting), and Manager Dashboard. Dashboards are a type of homepage containing reports and other widgets. You click a listed systems record or a segment in a report to see details.
• HR reports, including reports available on the dashboards. Various HR reports are predefined for you, and you can create additional reports.

**Grant or modify HR system access**

You can grant or modify HR system access for an employee using the HR Systems module.

Role required: hr_basic, or hr_manager

HR system access is granted for employees eligible for access to certain HR systems, such as the payroll system or benefits administration system. Employees can ask HR systems questions or request system access through the HR Service Portal. An HR systems case is opened and can be viewed and managed at HR - Systems Case Management HR Systems Cases.

   The HR Operations Access (System Access) list opens.
2. Click New to open an HR operations access record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Select the box to activate system access. Deselect to deactivate access.</td>
</tr>
<tr>
<td>Employee</td>
<td>The user requesting systems access.</td>
</tr>
<tr>
<td>Expire date</td>
<td>The date access is deactivated.</td>
</tr>
<tr>
<td>Justification</td>
<td>Details about why the user needs systems access.</td>
</tr>
<tr>
<td>Policy Acceptance</td>
<td>Select the box if a policy acceptance is required. Deselect if not.</td>
</tr>
<tr>
<td>Role</td>
<td>Specific role assignment for the HR system.</td>
</tr>
<tr>
<td>Username</td>
<td>The employee username.</td>
</tr>
<tr>
<td>Granting case</td>
<td>HR systems case number.</td>
</tr>
<tr>
<td>Grant date</td>
<td>Date access is granted.</td>
</tr>
<tr>
<td>HR system</td>
<td>Accessed HR system, such as Payroll System or Benefits Administration System.</td>
</tr>
</tbody>
</table>

4. Click Submit.
   The system access is listed in the HR Operations Access list.
5. To modify system access data, find the existing system access in the HR Operations Access list.
   You can use the list search menu by typing the employee name and pressing Enter.
6. Click the employee name to open the form.
   The HR Operations Access form opens displaying employee name and other populated fields.
7. Modify the form.
8. Click Update.

Create or modify HR system report definitions

You can add or modify HR system reports for an employee using the HR Systems module.

Role required: hr_basic, or hr_manager

Employees can ask about HR reports or request an HR report through the HR Service Portal. An HR report case is opened and can be viewed and managed at HR - Systems Case Management HR Systems Cases.

   The HR Operations Reports (Report Definitions) list opens.
2. Click New to open an HR operations report record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)
Table 47: HR Operations Report form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the report.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the report.</td>
</tr>
<tr>
<td>Report type</td>
<td>Type of report, such as Customer Satisfaction, Compliance, or Operational.</td>
</tr>
<tr>
<td>System</td>
<td>System for which the report is needed, such as Payroll System.</td>
</tr>
<tr>
<td>Justification</td>
<td>Why the report is needed.</td>
</tr>
<tr>
<td>Contact</td>
<td>Person to contact about the form.</td>
</tr>
<tr>
<td>Requester</td>
<td>Person requesting the report.</td>
</tr>
<tr>
<td>From</td>
<td>Beginning date for the comprised report data.</td>
</tr>
<tr>
<td>To</td>
<td>End date for the comprised report data.</td>
</tr>
</tbody>
</table>

4. Click Submit.
   The system report is listed in the HR Operations Report (Report Definitions) list.

5. To modify system report definitions data, find the existing system report definition in the HR Operations Report (Report Definitions) list.
   You can use the list search menu by typing the report name or the requestor name and pressing Enter.

6. Click the system report to open the form.
   The HR Operations Report form opens displaying report name and other populated fields.

7. Modify the form.
8. Click Update.

Create or modify HR system report frequencies

You can add or modify a system report frequency for an employee using the HR Systems module.

Role required: hr_basic, or hr_manager

Employees can ask about HR report frequencies or request an HR report frequency through the HR Service Portal. An HR report case is opened and can be viewed and managed at HR - Systems Case Management HR Systems Cases.

1. Navigate to HR - Systems Systems Reports Report Frequencies.
   The HR Operations Report Frequencies list opens.
2. Click New to open an HR operations report frequency record.
3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)
Table 48: HR Operations Report Frequency form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report frequency</td>
<td>How often the report generates, for example, daily, weekly, monthly.</td>
</tr>
</tbody>
</table>

4. Click Submit.
The system report is listed in the HR Operations Report Frequencies list.

5. To modify system report frequencies data, find the existing system report frequency in the HR Operations Report Frequencies list.
   You can use the list search menu by typing the report frequency name and pressing Enter.

6. Click the system report frequency to open the form.
The HR Operations Report Frequency form opens displaying the report frequency field.

7. Modify the form.

8. Click Update.

Create or modify an HR system report type

You can add or modify a system report type using the HR Systems module.
Role required: hr_basic, or hr_manager.

System report types can be viewed at HR - Systems Systems Reports Report Types.

Types of system reports include:
• Customer Satisfaction
• Compliance
• Operational
• Trend Analysis
• Other

1. Navigate to HR - Systems System Reports Report Types.
The HR Operations Report Types list opens.

2. Click New to open a system report type record.

3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

Table 49: HR Operations Report Type form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report type</td>
<td>The kind of report to generate, such as, compliance or operational.</td>
</tr>
</tbody>
</table>

4. Click Submit.
The system report type is listed in the HR Operations Report Types list.

5. To modify the system report type data, find the existing system report type in the HR Operations Report Types list.
You can use the list search menu by typing the report type name and pressing Enter.

6. Click the system report type to open the form.
   The HR Operations Report Type form opens displaying the report type.

7. Modify the form.

8. Click Update.

HR payroll

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

The HR Payroll module contains a list of all open payroll cases. The module allows HR agents to add and modify payroll records, banking accounts, and direct data.

The following information is set up and maintained as part of the HR Payroll module. Employees can access HR payroll information, enroll in direct deposit, and submit HR payroll cases from the HR Service Portal. HR managers or administrators set up and modify the information.

- HR Payroll Case Management
- Employee Payroll Records
- Bank Details
  - Bank Accounts
  - Direct Deposits

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

- Create HR payroll cases for employees to record the processing of HR payroll issues or enrollments.
- View HR payroll case information and manage the overall HR workload. For example, a manager can work with all HR cases that are not assigned.

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

HR payroll case management

You can use HR dashboards, reports, and other HR management modules to monitor and manage HR payroll cases.

You can view a list of all payroll cases in the HR - Payroll Case Management Payroll Cases module.

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

- Dashboards, including the Overview, Overview (Reporting), and Manager Dashboard. Dashboards are a type of homepage containing reports and other widgets. You click a listed payroll record or a segment in a report to see details.
- HR reports, including reports available on the dashboards. Various HR reports are predefined for you, and you can create additional reports.

Create or modify an employee payroll record

You can add or modify an employee payroll record using the HR Payroll module.
Role required: hr_basic, or hr_manager

Payroll records can be viewed at HR - Payroll Employee Payroll Records Payroll.

1. Navigate to HR - Payroll Employee Payroll Records Payroll.
   The HR Payrolls list opens.

2. Click New to open an HR payroll record.

3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

Table 50: HR Payroll form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>The name of the employee.</td>
</tr>
<tr>
<td>Pay period beginning</td>
<td>Day (date) the pay period starts.</td>
</tr>
<tr>
<td>Pay period end</td>
<td>Day (date) the pay period ends.</td>
</tr>
<tr>
<td>Current pay date</td>
<td>Most recent or closest approaching pay date.</td>
</tr>
<tr>
<td>Current income</td>
<td>Amount of income employee has earned to date.</td>
</tr>
<tr>
<td>Year to date income</td>
<td>Total salary and bonus income.</td>
</tr>
<tr>
<td>Current deductions</td>
<td>Amount deducted from income to date.</td>
</tr>
<tr>
<td>Year to date deductions</td>
<td>Total deducted from annual salary.</td>
</tr>
</tbody>
</table>

4. Click Submit.
   The payroll record is listed in the HR Payrolls list.

5. To modify payroll record data, find the existing payroll record in the HR Payrolls list.
   You can use the list search menu by typing the employee name.

6. Click the information icon next to the employee name to open the form.
   The HR Payroll form opens displaying the employee name and other populated fields.

7. Modify the form.

8. Click Update.

Create or modify an employee bank account

You can add or modify an employee bank account using the HR Payroll module.

Role required: hr_basic, or hr_manager

Employee bank account data can be viewed at HR - Payroll Bank Details Bank Accounts.

1. Navigate to HR - Payroll Bank Details Bank Accounts.
   The Bank Accounts list opens.

2. Click New to open a Bank Account record.

3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)
Table 51: Bank Account form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Employee name.</td>
</tr>
<tr>
<td>Account holder</td>
<td>Account holder name.</td>
</tr>
<tr>
<td>Account nickname</td>
<td>Personalized name for the account, such as, vacation savings or college student checking.</td>
</tr>
<tr>
<td>Bank name</td>
<td>Name of the bank.</td>
</tr>
<tr>
<td>Account type</td>
<td>Type of bank account, such as, checking or savings.</td>
</tr>
<tr>
<td>Account number</td>
<td>Bank account number.</td>
</tr>
<tr>
<td>Routing number</td>
<td>Bank routing number.</td>
</tr>
</tbody>
</table>

4. Click Submit.  
The bank account is listed in the Bank Accounts list.

5. To modify bank account data, find the existing bank account in the Bank Accounts list.  
   You can use the list search menu by typing the employee name and pressing Enter.

6. Click the employee name to open the form.  
The Bank Account form opens displaying employee name and other populated fields.

7. Modify the form.

8. Click Update.

Create or modify an employee direct deposit

You can add or modify an employee direct deposit using the HR Payroll module.

Role required: hr_basic, or hr_manager

Benefit providers can be viewed at HR - Payroll Bank Details Direct Deposits.

1. Navigate to HR - Payroll Bank Details Direct Deposits.  
The HR Direct Deposits list opens.

2. Click New to open an HR direct deposit record.

3. Complete the form. (The fields you see on the form depend on how the form is configured and what fields are selected to display.)

Table 52: HR Direct Deposit form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Employee name.</td>
</tr>
<tr>
<td>Bank account</td>
<td>Account holder name.</td>
</tr>
<tr>
<td>Deposit amount</td>
<td>Amount of money from paycheck for direct deposit.</td>
</tr>
</tbody>
</table>
### Field Description Table

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deposit type</td>
<td>Type of direct deposit, such as, amount, percentage, or remaining.</td>
</tr>
<tr>
<td>Active</td>
<td>Select to activate direct deposit for the employee. Leaving the box empty or deselected deactivates direct deposit.</td>
</tr>
</tbody>
</table>

4. Click Submit.
   The direct deposit is listed in the HR Direct Deposits list.

5. To modify direct deposit data, find the existing direct deposit in the HR Direct Deposits list.
   You can use the list search menu by typing the employee name and pressing Enter.

6. Click the information icon or the date in the Updated column of the list to open the form.
   The HR Direct Deposit form opens displaying employee name and other populated fields.

7. Modify the form.

8. Click Update.

### HR employee data management

HR Employee Data Management manages employee personal information, employment verification letter requests, onboarding tasks for new employees, and offboarding tasks for employees leaving the company.

HR specialists, generalists, and managers can:

- Onboard new employees.
- Offboard employees leaving the company.
- Update employee personal information.
- Send employment verification letters.

Employee data management cases can have multiple tasks assigned.

#### Example HR case request

Alan, an HR recruiter wants to send onboarding documents to new hires.

1. A hiring manager creates an onboarding request through the HR Service Portal or, Alan creates an HR onboarding request through HR - Employee Data Management. An HR onboarding case is created and assigned to an HR agent, such as a specialist or generalist, based on assignment rules.

2. The case is submitted for approval.

3. After receiving approval, the HR agent processes the HR case, creating HR tasks for this request. Tasks are assigned to the new employee and HR agents.

4. When all the tasks are completed, the HR case is closed.

### Create and complete an employee information change case

Employees can request employee information changes through the HR Service Portal. HR employees can create an employee data management case and fulfill this request through HR Employee Data Management.
You can fulfill an employee information change request through HR Employee Data Management.

1. Navigate to HR Employee Data Management Case Management Employee Data Management Cases.

   The Employee Data Management Cases list opens.

2. Click New or a case number.

   The Employee Data Management Case form opens. The workflow stages are listed across the top, and the new case is in the Draft stage.

3. Complete the fields on the form.

   

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>The auto-assigned case ID number, which cannot be changed.</td>
</tr>
<tr>
<td>Opened for</td>
<td>The user who needs HR assistance. Click the Lookup using list icon and select the user. The location and department information is filled in automatically.</td>
</tr>
<tr>
<td>Location</td>
<td>The geographical location of the user associated with the case.</td>
</tr>
<tr>
<td>Department</td>
<td>The department of the user associated with the case. If you select the department, the Manager field is populated if there is an assigned department head.</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the HR case. By selecting the category, you can save the new case and initiate the auto-assignment process, if one is available. Select Employee Information Change.</td>
</tr>
<tr>
<td>Skills</td>
<td>The required skills of the person assigned to this category of HR case.</td>
</tr>
<tr>
<td>State</td>
<td>The state or status of the case.</td>
</tr>
<tr>
<td>Priority</td>
<td>The precedence of the case, based on the category and whether the employee is a VIP.</td>
</tr>
<tr>
<td>Opened</td>
<td>The date and time the case is opened.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>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 Assigned to field. Assignment groups are restricted to those groups with a type of human_resources.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Assigned to</td>
<td>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.</td>
</tr>
<tr>
<td>Watch list</td>
<td>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.</td>
</tr>
<tr>
<td>Short description</td>
<td>A brief description of the case. A default value appears when a category is selected.</td>
</tr>
<tr>
<td>Description</td>
<td>A longer, more detailed description of the case.</td>
</tr>
<tr>
<td>Work notes or additional comments</td>
<td>Additional information about the case. Click Work notes to add it as an internal work note. Enter the information and click Additional comments if you want the user to see it.</td>
</tr>
</tbody>
</table>

4. Approval is required before the case can move forward. After approval is received, the information is updated and the state changes to Closed Complete.

5. To update additional information, click the About Employee, Employment Information, and Contact Information tabs to add or change personal information.

6. Click Submit to save and close the case and return to the Employee Data Management Cases list or Ready for Work to save and close the case and remain on the Employee Data Management Case form.

After the HR Employee Data Management 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 in order for 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 HR - Case Management Case Management Case SLAs. You can also run SLA reports.

Create an employee offboarding case

HR agents can offboard employees using the HR - Employee Data Management module.

Role required: hr_basic or hr_case_writer

HR agents can offboard employees leaving the company using the Employee Data Case Management form.

1. Navigate to HR - Employee Data Management Case Management Employee Data Management Cases.
   The Employee Data Management Cases list opens.
2. Click New or a case number.
   The Employee Data Management Case form opens. The workflow stages are listed across the top, and the new case is in the Draft stage.
3. Complete the fields on the form.
Table 54: Employee Data Management Case fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>The auto-assigned case ID number, which cannot be changed.</td>
</tr>
<tr>
<td>Opened for</td>
<td>Click the Lookup icon and select the employee to be offboarded.</td>
</tr>
<tr>
<td>Location</td>
<td>The geographical location of the user associated with the case.</td>
</tr>
<tr>
<td>Department</td>
<td>The department of the user associated with the case.</td>
</tr>
<tr>
<td></td>
<td>If you select the department, the Manager field is populated if there is an assigned department head.</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the HR case. Select Employee Offboarding.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Some of the case categories have an associated workflow.</td>
</tr>
<tr>
<td>Skills</td>
<td>The required skills of the person assigned to this category of HR case.</td>
</tr>
<tr>
<td>State</td>
<td>The state of the case. The state is also displayed along the top.</td>
</tr>
<tr>
<td>Priority</td>
<td>The precedence of the case, based on the category and whether the employee is a VIP.</td>
</tr>
<tr>
<td>Opened</td>
<td>The date and time the case is opened.</td>
</tr>
<tr>
<td>Opened by</td>
<td>The user creating the record.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>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 Assigned to field. Assignment groups are restricted to those groups with a type of human_resources.</td>
</tr>
<tr>
<td>Assigned to</td>
<td>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.</td>
</tr>
<tr>
<td>Watch list</td>
<td>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.</td>
</tr>
<tr>
<td>Short description</td>
<td>A brief description of the case. A default value appears when you select a category.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Description</td>
<td>A longer, more detailed description of the case.</td>
</tr>
<tr>
<td>Work notes or additional comments</td>
<td>Additional information about the case. Click Work notes to add it as an internal work note. Enter the information and click Additional comments if you want the user to see it.</td>
</tr>
</tbody>
</table>

4. Approval is required before the case can move forward. After approval is received, the information is updated and the state changes to Work in Progress.

5. Scroll down to view the tasks assigned for offboarding.

6. Click a task number (HRTxxxxxxx) to view details and update the state.

7. Click Update to save and return to the Employee Data Management Case form or Save to save and remain on the HR Task form.

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 when 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.

Complete an employee offboarding case

You can work on an offboarding request to ensure that all required documents have been reviewed and signed prior to the last day of an employee.

Role required: hr_basic or hr_case_writer

HR agents ensure that all required offboarding tasks have been completed as part of the offboarding process.

Approval is required. Approvers use the HR Service Portal or from the case on the Employee Data Management Case page. After approval is received, the State changes to Work in Progress.

1. Navigate to HR - Employee Data Management Case Management Employee Data Management Cases or to HR - Case Management HR Tasks Assigned to me.

2. Click a case number.

3. Scroll down and review the HR Tasks.
   As assigned tasks are completed, the State changes to Closed Complete. Tasks in Ready state are not complete.

4. Click the task numbers assigned to you.

5. Click Start Work to save the case information and change the status from Ready to Work in Progress.

6. Change the state to Closed Complete when the task has completed.

7. Click Update to save and return to the Employee Data Management Case form or Save to save and remain on the HR Task form.

8. When all tasks are complete, change the state of the case to Closed Complete.

9. Click Update to save and return to the Employee Data Management Case list or Save to remain on the Employee Data Management Case form.
After the HR Employee Data Management 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 in order for 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 HR - Case Management Case Management Case SLAs. You can also run SLA reports.

Create an employment verification letter case

Employees can request an employment verification letter through the HR Service Portal. HR employees can create an HR case and fulfill this request through HR Employee Data Management.

When an employee requests an employment verification letter, HR agents use HR Employee Data Management to fulfill this request. The letter is generated based on the HR profile information. The HR agent assigned to the request can attach the letter to an email message and send it to the contact email address provided.

1. Navigate to HR - Employee Data Management Case Management Employee Data Management Cases.
   The Employee Data Management Cases list opens.
2. Click New or a case number.
   The Employee Data Management Case form opens. The workflow stages are listed across the top, and the new case is in the Draft stage.
3. Complete the form.

Table 55: Employee Data Management Case fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>The auto-assigned case ID number, which cannot be changed.</td>
</tr>
<tr>
<td>Opened for</td>
<td>The user who needs HR assistance. Click the Lookup using list icon and select the user. The location and department information is filled in automatically.</td>
</tr>
<tr>
<td>Location</td>
<td>The geographical location of the user associated with the case.</td>
</tr>
<tr>
<td>Department</td>
<td>The department of the user associated with the case. The Manager field is populated when there is an assigned department head.</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the HR case. By selecting the category, you can save the new case and initiate the auto-assignment process, if one is available.</td>
</tr>
</tbody>
</table>

*Note:* Some of the case categories have an associated workflow.

Select Employment Verification Letter.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDF Template</td>
<td>Location of the employee determines the letter template. Change by clicking the Lookup icon to view a list of letters.</td>
</tr>
<tr>
<td>Skills</td>
<td>The required skills of the person assigned to this category of HR case.</td>
</tr>
<tr>
<td>State</td>
<td>The state of the case and also displayed along the top.</td>
</tr>
<tr>
<td>Priority</td>
<td>The precedence of the case, based on the category and whether the employee is a VIP.</td>
</tr>
<tr>
<td>Opened</td>
<td>The date and time the case is opened.</td>
</tr>
<tr>
<td>Opened by</td>
<td>The user creating the record.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>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 Assigned to field. Assignment groups are restricted to those groups with a type of human_resources.</td>
</tr>
<tr>
<td>Assigned to</td>
<td>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.</td>
</tr>
<tr>
<td>Watch list</td>
<td>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.</td>
</tr>
<tr>
<td>Short description</td>
<td>A brief description of the case. A default value appears when you select a category.</td>
</tr>
<tr>
<td>Description</td>
<td>Contact information provided by the employee displays.</td>
</tr>
<tr>
<td>Work notes or additional comments</td>
<td>Additional information about the case. Click Work notes to add it as an internal work note. Enter the information and click Additional comments if you want the user to see it.</td>
</tr>
</tbody>
</table>

4. Click the About Employee, Employment Information, and Contact Information tabs to add or change personal information.

5. Click Update to save and return to the Employee Data Management Cases list or Start Work to save and remain on the Employee Data Management Case form. The State changes to Work in Progress. Knowledge articles based on the short description are listed. There are two tabs. One showing articles that you have access to, and one showing articles that the caller can access. Different geographic locations or holiday schedules by county determine the article selection.

6. To preview and attach a knowledge article to the case, complete the following steps.
   a) Click Preview next to an article.
If you know that 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.

b) 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.

After the HR Employee Data Management 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 when 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 HR - Case Management Case Management Case SLAs. You can also run SLA reports.

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 Employee Data Management Case form.

Role required: hr_basic 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 Employee Data Management Case form.

1. Open an employment verification request and click Start Work.
2. Review the contact information provided by the employee in the Description field.
3. To obtain missing 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. The default employee verification letter displays. Click the Lookup using list icon to select a different PDF Template.
5. To generate the letter as a PDF, click Generate Document. The letter opens in the Edit document page.
6. Edit the letter.
7. Click Sign to draw your signature.
8. Click Accept. 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.
9. To send the letter, click Send Email.
10. Verify the email address. Click OK to send the email.
11. After receiving acceptance from the employee, change the State to Closed Complete.
12. Click Update to save and remain on the Employee Data Management Case form or Save to save and return to the Employee Data Management Cases list.

Create a new hire onboarding case

HR agents can onboard new employees using the HR - Employee Data Management module.

Role required: hr_basic or hr_case_writer

HR agents can onboard new employees using the Employee Data Case Management form.

1. Navigate to HR - Employee Data Management Case Management Employee Data Management Cases .
   The Employee Data Management Cases list opens.
2. Click New or a case number.
   The Employee Data Management Case form opens. The workflow stages are listed across the top, and the new case is in the Draft stage.
3. Complete the form.

Table 56: Employee Data Management Case fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>The auto-assigned case ID number, which cannot be changed.</td>
</tr>
<tr>
<td>Opened for</td>
<td>For an onboarding case, the user is not yet in the system. Leave this field blank and from Category select New Hire Onboarding.</td>
</tr>
<tr>
<td>Location</td>
<td>The geographical location of the user associated with the case.</td>
</tr>
<tr>
<td>Department</td>
<td>The department of the user associated with the case. If you select the department, the Manager field is populated if there is an assigned department head.</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the HR case. By selecting the category, you can save the new case and initiate the auto-assignment process, if one is available.</td>
</tr>
</tbody>
</table>

**Note:** Some of the case categories have an associated workflow.

Select New Hire Onboarding and the Create Onboarding User dialog box opens.
Enter the First name, Last name, and Personal email of the onboarded employee.

<p>| Skills    | The required skills of the person assigned to this category of HR case. |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>The state of the case and also displayed along the top.</td>
</tr>
<tr>
<td>Priority</td>
<td>The precedence of the case, based on the category and whether the employee is a VIP.</td>
</tr>
<tr>
<td>Opened</td>
<td>The date and time the case is opened.</td>
</tr>
<tr>
<td>Opened by</td>
<td>The user creating the record.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>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 Assigned to field. Assignment groups are restricted to those groups with a type of human_resources.</td>
</tr>
<tr>
<td>Assigned to</td>
<td>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.</td>
</tr>
<tr>
<td>Watch list</td>
<td>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.</td>
</tr>
<tr>
<td>Short description</td>
<td>A brief description of the case. A default value appears when you select a category.</td>
</tr>
<tr>
<td>Description</td>
<td>A longer, more detailed description of the case.</td>
</tr>
<tr>
<td>Work notes or additional comments</td>
<td>Additional information about the case. Click Work notes to add it as an internal work note. Enter the information and click Additional comments if you want the user to see it.</td>
</tr>
</tbody>
</table>

4. Click the About Employee, Employment Information, and Contact Information tabs to add or change personal information.

5. Click Submit to save and return to the Employee Data Management Cases list or Ready for Work to save and remain on the Employee Data Management Case form. The State changes to Ready.

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 when 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.

**Complete a new hire onboarding case**

You can work on an onboarding request to ensure that all required documents have been reviewed and signed prior to the first day of a new hire.
Role required: hr_basic or hr_case_writer

HR agents ensure that new hires as part of the onboarding process review and sign all required documents.

Approval is required. Approvers use the HR Service Portal or from the case on the Employee Data Management Cases form. After approval is received, the State changes to Work in Progress.

1. Navigate to HR - Employee Data Management Case Management Employee Data Management Cases.
2. Click a case number.
3. Scroll down and review the HR Tasks.
   As the new employee completes the assigned tasks, the State changes to Closed Complete. Tasks in Ready state are not complete.
4. Click the task numbers assigned to you.
5. Click State or use the buttons at the top of the page.
6. Click Save or Start Work to save the case information and change the status to Work in Progress. Click Update to save the case information and return to the Employee Data Management Cases list.
   When all tasks are complete, the state of the case changes to Closed.
   To reactivate a user with a Canceled state, check the Active box under the User ID.

Approve an employee change request

Approving a request to change employee HR profile information updates the HR profile and automatically closes the case.

Role required: hr_basic or hr_approver_user

Employees can change personal information in their HR profile or a manager can submit a request of a direct report. For example, when a direct report is promoted to a new position.

When a change request is submitted, an HR case is opened, and the Employee Change HR Workflow determines approval requirements.

- If no approval is required, the HR profile is updated automatically and the HR case is closed.
- If it does require 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 HR - Case Management 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.

Workday integration

The Workday integration synchronizes employee profile information in the Human Resources 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.

```javascript
// 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.

Activate the Workday integration

Human Resources Application: Workday Integration is available as a separate plugin and is part of the Human Resources Application subscription.

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. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.
   - If the plugin depends on other plugins, these plugins are listed along with their activation status.
   - If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.
4. 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 also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.
5. Click Activate.

Create integration system users

You must first configure two system user accounts in Workday for integration, if they are not already created. One account is used for inbound integration, and the other is used for outbound integration.

1. Log in to Workday with the account that provides administrative privileges.
2. Create the users and add them to a group by completing the following steps.
   a) Search for and open the Create Integration System User task.
   b) Configure and save two integration system users.
   c) Search for and open the Create Security Group task.
   d) In the Type of Tenanted Security Group field, choose Integration System Security Group (Unconstrained).
   e) Enter a group name and click OK.
f) Select the users you created from the Integration System Users choice list and click OK, and then click Done.

3. Add the integration security group to domains by completing the following steps.
   a) Search for domain: manage org and open the Manage: Organization Integration domain.
   b) Click the ellipsis (...) next to Manage Organization Information.
   c) In the window that opens, point to Domain and select Edit Security Policy Permissions.
   d) Under Integration Permissions, add the security group that you created and click OK.
   e) Repeat the previous steps to add the security group to the following domains:
      - domain: Worker Data: public worker reports
      - domain: Worker Data: Current Staffing Information
      - domain: Worker Data: gender
      - domain: Worker Data: Contingent Worker Assignment Details
      - domain: Worker Data: Personal Data
      - domain: Worker Data: Worker ID
      - domain: Worker Data: Home Contact Information
      - domain: Manage: Location
      - domain: Manage: Organization Integration
      - domain: Organization: Cost Center
      - domain: Job Information

4. Add the group to the business processes Contact Change and Name Change by completing the following steps.
   a) Search for contact change and click the ellipsis (...) next to Contact Change (Default Definition).
   b) In the window that opens, point to Business Process Policy and select Edit.
   c) Under Web Service Request, add the security group that you created and click OK.
   d) Repeat the previous steps to add the security group to Name Change.

5. Activate Pending Security Policy Changes by completing the following steps.
   a) Search for activate.
   b) Click Activate Pending Security Policy Changes.
   c) Enter a comment and click OK.

Configure Workday integration properties

After you set up the system user accounts in Workday, configure the integration properties on your instance.

Role required: admin

1. Navigate to Integration-Workday Workday Properties.
2. Set the configuration options.
### Table 57: Workday integration properties

<table>
<thead>
<tr>
<th>Properties</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto create system users for imported employees</td>
<td>Select this option to create new user records in the User [sys_user] table when Workday users are not found in the instance’s user records.</td>
</tr>
<tr>
<td>Push HR profile changes to Workday.</td>
<td>Select this option to push changes made to contact information in the HR profile to update associated records in Workday.</td>
</tr>
<tr>
<td>Auto update the contact information and name change by turning off the Workday business process.</td>
<td>Select this option to allow the HR profile updates to skip the Workday business process and directly update the Workday record.</td>
</tr>
<tr>
<td>Enable the debug log</td>
<td>Select this option to print information to the system log.</td>
</tr>
<tr>
<td>If checked then the transform will run without any data being persisted</td>
<td>Select this option to run an import set transform before user data is written to the hr_profile table. You can view the results of the transform. When you are certain that the data import from Workday is correct, clear this option so the HR tables can be updated.</td>
</tr>
<tr>
<td>Workday Endpoint URL</td>
<td>Enter the Workday web service URL. Include v21.1 in the wsdl portion of the URL. For example:</td>
</tr>
<tr>
<td></td>
<td>https://(server_name)/ccx/service/(tenant_name)/Human_Resources/v21.1/?wsdl</td>
</tr>
<tr>
<td></td>
<td>If you do not know your endpoint URL, contact Workday, or, if you have access to the Workday community, see their Getting Started documentation for more information (requires login).</td>
</tr>
<tr>
<td>Workday Integration Outbound User username</td>
<td>Enter the outbound integration user name you configured in Workday. Include @[tenant_name] after the user name.</td>
</tr>
<tr>
<td>Workday outbound password</td>
<td>Enter the corresponding password for the outbound Workday user.</td>
</tr>
<tr>
<td>Workday Integration Inbound User username</td>
<td>Enter the inbound integration user name you configured in Workday. Include @[tenant_name] after the user name.</td>
</tr>
<tr>
<td>Workday inbound password</td>
<td>Enter the corresponding password for the inbound Workday user.</td>
</tr>
<tr>
<td>Properties</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Date since last successful run</td>
<td>Enter the start date from which you want new user data to be transferred. The system transfers user records from Workday that were updated on this date or later. Leave this field blank to update all user data regardless of when the data was updated.</td>
</tr>
<tr>
<td>Number of days to look ahead for getting on-boarding and off-boarding events</td>
<td>Enter the number of days that the application looks ahead for an upcoming event in Workday to determine when to create or modify an HR profile record. The default is 28 days. For example, if you create a record in Workday today for an employee coming starting in 30 days, and you keep the default setting of 28 days, the user and HR profile records are created in two days, and are automatically set to Active when the employee comes on board.</td>
</tr>
</tbody>
</table>

3. Click Save.

### Configure a scheduled script to run the import

The Workday integration provides a scheduled script to run the data import. If it is not available on your instance, create one with this configuration.

Role required: admin

1. Navigate to Integration-Workday Import Schedule.
2. Click New.
3. Complete the form with these values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a descriptive name for the web service, such as workday sync.</td>
</tr>
<tr>
<td>Active</td>
<td>Select this check box to activate the web service for use.</td>
</tr>
<tr>
<td>Run</td>
<td>Select how often the scheduled script extension runs. Retrieve employee data as often as it is typically updated in Workday.</td>
</tr>
<tr>
<td>Time or Day</td>
<td>Select the time of day or the specific day of the week that the script runs.</td>
</tr>
<tr>
<td>Conditional</td>
<td>Leave this check box unselected.</td>
</tr>
<tr>
<td>Run this script</td>
<td>Enter the following script to execute: <code>workday_Factory.wrap(&quot;workday_sync&quot;).exec();</code></td>
</tr>
</tbody>
</table>

4. Click Submit.
Customize the data retrieval script include

You can modify the default script includes to get additional data from Workday.

Role required: admin

1. Navigate to Integration-Workday Script Includes.
2. Open the workday_Factory script.
3. Modify the script as necessary. Use any of the following examples.

The following customization of the workday_Factory script calls the newly created cust_workday_worker_retriever class.

```javascript
workday_Factory.getWrapperType=function(scriptName){
    var overridenWrapperType =
    workday_Factory.registeredClassesInternal[scriptName];
    if(overridenWrapperType){
        return overridenWrapperType;
    }else{
        switch(scriptName +"""){
            case workday.WORKER_RETRIEVER:
                return cust_workday_worker_retriever;// This is the
                name of the new script include that extends workday_worker_retriever;
                default:
                    return workday_BaseFactory.getWrapperType(scriptName);
        }
    }
};
```

The following example is a customized version of the worker_retriever script named cust_workday_worker_retriever. In this example, the createUser function and the getUserName functions are customized. The createUser function sets the company value to a specific sys_id. The getUserName function returns a trimmed version of the source's user name to show only the first name and the last name with a period (.) between them, such as john.doe.

```javascript
var cust_workday_worker_retriever =Class.create();
cust_workday_worker_retriever.prototype=
Object.extendsObject(workday_worker_retriever,{
    createUser:function(source, userName){var destRec =
    workday_worker_retriever.prototype.createUser.call(this, source,
    userName);
        if(destRec){
            destRec.setValue('company','92f199bd0a0a3cba010e1fcc114bf137');
            return destRec;}},
    getUserName:function(source){return
    source.u_wd_pref_first_name.trim()+'.'+
    source.u_wd_pref_last_name.trim();},
    type:"cust_workday_worker_retriever"
});
```

Add information to the HR profile table

The Worker object from which you obtain employee data provides additional information that you can save to the HR Profile table.
Role required: admin

1. Modify the integration table and transaction table:
   a) Navigate to System Definition Tables.
   b) Use the system dictionary to add a column in both the appropriate integration table and the transactional table in the instance.
      For example, to add employee data such as Seniority Date, add a column in both the Workday DS [workday_data_import] table and the HR Profile [hr_profile] table.

2. Modify the XPATH script include:
   a) Navigate to Integration - Workday Script Includes and open the appropriate XPATH map script include.
      For example, if you are adding employee data to the HR Profile table, open workday_worker_xpath_map.
   b) Add the Workday information item you want to import.
      For example, to add worker nationality:

      ```
      colToXPathMap.wd_nationality = "wd:Worker_Data/wd:Personal_Data/
      wd:Citizenship_Status_Reference/wd:ID[@wd:type='Citizenship_Status_Code']
      ```

      Some of the additional information that you may want to import is already in the script includes, but is commented out. You can remove the comment marks to import the information.

3. Modify the transform map:
   a) Navigate to Integration - Workday Transform Maps and open the appropriate transform map, such as Workday_Data_Transform.
   b) In the Field Maps related list, click New.
   c) In the Source field, select the field you created in the integration table.
   d) In the Target field, select the field you created in the instance's transactional table, such as the HR Profile table.
   e) Click Submit.

Modify the import schedule

You can modify the import schedule, or run on-demand imports from the import script.

Role required: admin

1. Navigate to Integration - Workday Import Schedule.
2. Open workday_sync.
3. Change the Run value to the frequency you want and modify the Time that the import script runs.
4. To deactivate the script and pause the data import, clear the Active check box.
5. To run the script on demand, click Execute Now.
6. When you are finished modifying the schedule, click Update.

Installed with the Workday integration
Activating the Human Resources Application: Workday Integration plugin adds or modifies tables, script includes, and other components. The Human Resources Application: Core plugin is activated if it was not previously activated.

Demo data is available.

Tables installed with Workday integration

Workday integration adds the following tables.

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Department interface</td>
<td>Saves department data imported from Workday.</td>
</tr>
<tr>
<td>[hr_cmn_department_int]</td>
<td></td>
</tr>
<tr>
<td>HR Locations interface table</td>
<td>Saves location data imported from Workday.</td>
</tr>
<tr>
<td>[hr_cmn_location_int]</td>
<td></td>
</tr>
<tr>
<td>HR Job Profiles</td>
<td>Saves job profile records.</td>
</tr>
<tr>
<td>[hr_job_profile]</td>
<td></td>
</tr>
<tr>
<td>HR Job Profiles interface table</td>
<td>Saves job profile information imported from Workday.</td>
</tr>
<tr>
<td>[hr_job_profile_int]</td>
<td></td>
</tr>
<tr>
<td>Workday Data Import</td>
<td>Saves employee data imported from Workday.</td>
</tr>
<tr>
<td>[workday_data_import]</td>
<td></td>
</tr>
<tr>
<td>Workday ID Cross Reference</td>
<td>Saves the mapping relationships between the Workday record IDs and sys_id's.</td>
</tr>
<tr>
<td>[workday_id_cross_reference]</td>
<td></td>
</tr>
</tbody>
</table>

Script includes installed with Workday integration

Workday integration adds the following script includes.

<table>
<thead>
<tr>
<th>Script include</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>workday</td>
<td>The constants used by all the Workday integration scripts.</td>
</tr>
<tr>
<td>workday_AbstractWrapper</td>
<td>The abstract wrapper used to wrap scripts related to the Workday integration.</td>
</tr>
<tr>
<td>workday_BaseFactory</td>
<td>The base class providing wrappers for HR objects.</td>
</tr>
<tr>
<td>workday_Base_Data_Retriever</td>
<td>The wrapper class for main data retrieval script.</td>
</tr>
<tr>
<td>workday_contact_loader</td>
<td>The script to push contact data to Workday.</td>
</tr>
<tr>
<td>workday_Data_Loader</td>
<td>The wrapper class for the main data loader script.</td>
</tr>
<tr>
<td>workday_department_retriever</td>
<td>The data retrieval script that obtains department information from Workday.</td>
</tr>
</tbody>
</table>
### Script include

<table>
<thead>
<tr>
<th>Description</th>
<th>Script include</th>
</tr>
</thead>
<tbody>
<tr>
<td>The map with references to the import set table column names and the corresponding XPath in the SOAP response XML schema for departments.</td>
<td>workday_department_xpath_map</td>
</tr>
<tr>
<td>The customizable class providing the correct Workday script wrapper type. Customers should modify this class when adding their own wrapper implementations.</td>
<td>workday_Factory</td>
</tr>
<tr>
<td>The data retrieval script that obtains both onboarding and offboarding events from Workday. For example, if an employee is in the Workday system but is not active until a certain date, this retriever is used to create the new user in the instance. The workday_worker_retriever script is what actually changes the employee to active when it runs.</td>
<td>workday_future_retriever</td>
</tr>
<tr>
<td>The script to retrieve all job profiles.</td>
<td>workday_job_profile_retriever</td>
</tr>
<tr>
<td>The map with references to the import set table column names and the corresponding XPath in the SOAP response XML schema for job profiles.</td>
<td>workday_job_profile_xpath_map</td>
</tr>
<tr>
<td>The data retrieval script that obtains locations from Workday.</td>
<td>workday_location_retriever</td>
</tr>
<tr>
<td>The map with references to the import set table column names and the corresponding XPath in the SOAP response XML schema for locations.</td>
<td>workday_location_xpath_map</td>
</tr>
<tr>
<td>The script to push name data to Workday.</td>
<td>workday_name_change</td>
</tr>
<tr>
<td>The Workday data retriever.</td>
<td>workday_sync</td>
</tr>
<tr>
<td>The data retrieval script that obtains updated and effective changes related to workers. You can create a custom version of this script if you want to get different information from Workday.</td>
<td>workday_worker_retriever</td>
</tr>
<tr>
<td>The map with references to the import set table column names and the corresponding XPath in the SOAP response XML schema for workers.</td>
<td>workday_worker_xpath_map</td>
</tr>
</tbody>
</table>

### User roles installed with Workday integration

Workday integration adds the following role.

<table>
<thead>
<tr>
<th>Role title [name]</th>
<th>Description</th>
<th>Contains roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workday administrator [workday_integration_role]</td>
<td>Can edit workday integration properties.</td>
<td>none</td>
</tr>
</tbody>
</table>
Scheduled jobs installed with Workday integration

Workday integration adds the following scheduled job.

<table>
<thead>
<tr>
<th>Scheduled job</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>workday sync</td>
<td>The schedule that the application follows to import data from Workday. By default, the schedule is set to run the import every day at midnight.</td>
</tr>
</tbody>
</table>

Web services installed with Workday integration

Workday integration adds the following web service functions in Workday Web Service.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workday_Template</td>
<td>Creates a SOAP envelope for the push request.</td>
</tr>
<tr>
<td>Get_All_Departments</td>
<td>Retrieves all worker information from the Worker object.</td>
</tr>
<tr>
<td>Get_All_Job_Profiles</td>
<td>Retrieves all job profiles from the Worker object.</td>
</tr>
<tr>
<td>Get_All_Locations</td>
<td>Retrieves all locations in your organization.</td>
</tr>
<tr>
<td>Get_All_Workers</td>
<td>Retrieves all worker information from the Worker object.</td>
</tr>
<tr>
<td>Get_Effective_Workers</td>
<td>Retrieves all effective worker information from the Worker object, including events that take place on a future date (the effective date).</td>
</tr>
<tr>
<td>Get_Server_Timestamp</td>
<td>Retrieves the timestamp from the server.</td>
</tr>
<tr>
<td>Get_Updated_Workers</td>
<td>Gets only updated information for workers.</td>
</tr>
<tr>
<td>Get_Updated_Future_Workers</td>
<td>Gets only updated information for onboarding workers.</td>
</tr>
</tbody>
</table>

Transform maps installed with Workday integration

Workday integration adds the following transform maps.

<table>
<thead>
<tr>
<th>Transform map</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workday_Data_Transform</td>
<td>Defines the field relationships between fields for the Workday DS [workday_data_import] source table and the HR Profile [hr_profile] target table.</td>
</tr>
<tr>
<td>Workday_Department_Transform</td>
<td>Defines the field relationships between fields for the HR Department interface [hr_cmn_department_int] source table and the Department [cmn_department] target table.</td>
</tr>
<tr>
<td>Transform map</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Workday_Job_Profiles_Transform</td>
<td>Defines the field relationships between fields for the Job Profiles interface [hr_job_profile_int] source table and the HR Job Profiles [hr_job_profile] target table.</td>
</tr>
<tr>
<td>Workday_Locations_Transform</td>
<td>Defines the field relationships between fields for the HR Locations interface [hr_cmn_location_int] source table and the Location [cmn_location] target table.</td>
</tr>
</tbody>
</table>
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