Only the HR Administrator [sn_hr_core.admin] can assign scoped HR roles.

System Administrators (admin) and HR scoped users can still impersonate ServiceNow users. When impersonating a user with a scoped HR role, an admin or any HR scoped user cannot access features granted by that role. HR cases and profile information are not accessible. Only users with the scoped HR Administrator [sn_hr_core.admin] can see case details when impersonating other scoped HR users. Also, admin cannot change the password of any user with a scoped HR role.

ole	Description
System Administrator [admin]	Also known as admin and IT admin. Within the global scope of the application, has access to all system features, functions, and data, regardless of security constraints. • Grant users with the delegated developer role [delegated_developer]. • Build export sets, move content between instances (development to production), and clone instances. • Run guided setup or modules to manage: Company-wide objects like user, departments, and locations.
HR Administrator [sn_hr_core.admin]	This role can: • Assign users any of the HR roles. • View and access the HR Service Portal. • View, create, and edit HR cases in **HR Case Management**. • Access and create HR tasks inside an HR case using the **Add Task** related link. • View, create, and edit HR profiles including sensitive information like SSN and salary. • Create HR profiles and generate for multiple users through custom criteria. • Associate any user to HR roles, groups, and skills. • View and access **HR Administration**. • View and access **HR Dashboards & Reports**. • Run **Application View** to manage: HR objects like HR roles and profiles. **Note:** When the Human Resources Scoped App: Core (com.sn_hr_core) and Lifecycle Events (com.sn_hr_lifecycle_events) plugins are active, the Lifecycle Admin (sn_hr_le.admin) role is part of HR Admin (sn_hr_core.admin).
Delegated Developer [delegated_developer]	When added to the HR Administrator role, can: • Access, and manage HR objects like HR profile, cases, groups, roles, service catalog objects, and Service Portal. • Modify HR application-related objects like skills, Knowledge Base, chat, notifications, surveys, reports, integrations, and SC. • Modify application structures like tables, business rules, and client-side validation,
User with HR role	There are specific HR roles that allow users access to specific areas of the system. For example, the HR profile reviewer [sn_hr_core.profile_reader] role can read profiles, but not edit them.
User without HR role	Users without an HR role cannot access HR Service Delivery.
User with no role	Users with no role cannot see any HR information even on HR cases they created or have HR tasks assigned to them.

Minimum number of scoped admins required
System properties determine the minimum number (default is two) of scoped admins that must be active for an application. For example,

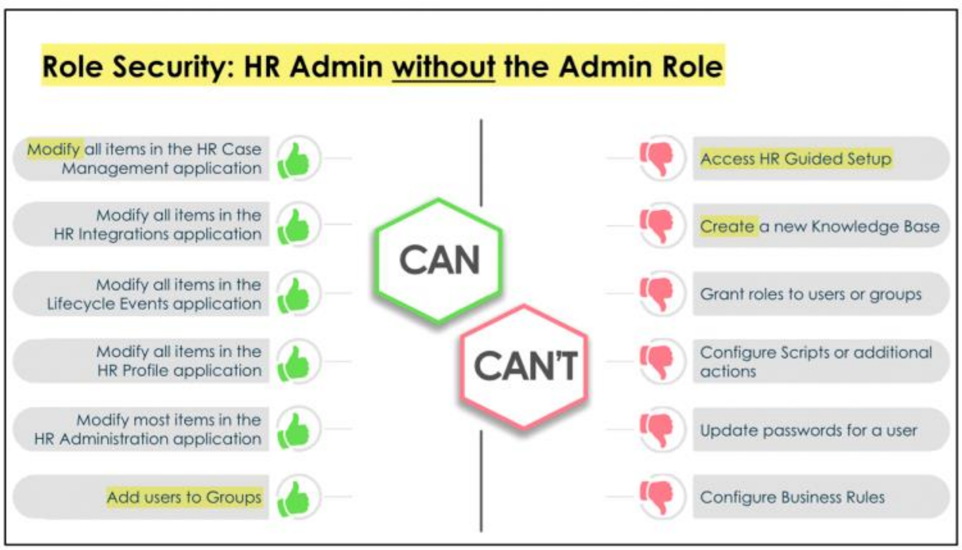
- sn_hr_ef.min_admin_count = 2
- You have two users with the sn_hr_core.admin role.
- If you try to delete one of the users, an error message appears and prevents you from deleting the user

Employee Center administrator [sn_hr_sp.esc_admin] role is also contained in the IT System Administrator [admin] role. See to it that someone in your organization has the Employee Center administrator [sn_hr_sp.esc_admin] role to perform the Employee center duties in the absence of IT System Administrator

All HR scheduled jobs will run as usual even after the HR Administrator role is removed from the IT System Administrators.

HR Administrator with Delegated Developer role
The HR Administrator role with the delegated developer role can:

- Add and update script includes.
- Add and update ACLs.
- Configure forms.
- Configure related lists.
- Configure and create COEs



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Who Uses Human Resources Service Delivery?

Employees or Workers

- Submits requests, completes tasks, and reviews status using the Employee Center
- Searches the Knowledge base

HR Professionals

- Work HR cases to answer questions or fulfill requests

Examples:
Benefits, Employee Relations, Payroll

Other Departments

- Work assigned HR Tasks

Example:
Grant access to system

Leadership

- Monitor progress
- Make strategic decisions for HR

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Global Scope

- ✓ Applications intended to be accessible to all applications in the ServiceNow platform
- ✓ System Administrator [admin] has full access to all Global scoped applications

Scoped HRSD Applications

- ✓ Prevents users outside of the HR organization from accessing HR data
- ✓ When a platform Admin without an HR role impersonates, they are not able to view HR Cases and confidential profile information
- ✓ Platform Admins without the HR Admin role cannot grant scoped HR roles

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HRSD SKUs

SKU

APPLICATION	HR Service Delivery Professional	HR Service Delivery Enterprise	Standalone Solutions
Case and Knowledge	X	X	
Employee Center Pro	X	X	X
Employee Relations	X	X	
Performance Analytics	X	X	X
Agent Workspace	X	X	
Lifecycle Events	X (HR only)	X (LE Enterprise)	X
Employee Journey Management		X	
Employee Document Management	$	$	$

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Also included in HR Service Delivery Professional:

- Predictive Intelligence
- Now Mobile and Mobile Agent
- Virtual Agent; including HRDS NLU model for Virtual Agent conversations
- Universal Requests

Also included in HR Service Delivery Enterprise:

- HR Service Delivery Professional, *plus:*
- Universal Request integration with MS Teams
- Learning Posts
- Journey Accelerator
- Listening Posts
- Employee Journey Management
- Enterprise Onboarding and Transitions
- Alumni Service Centre

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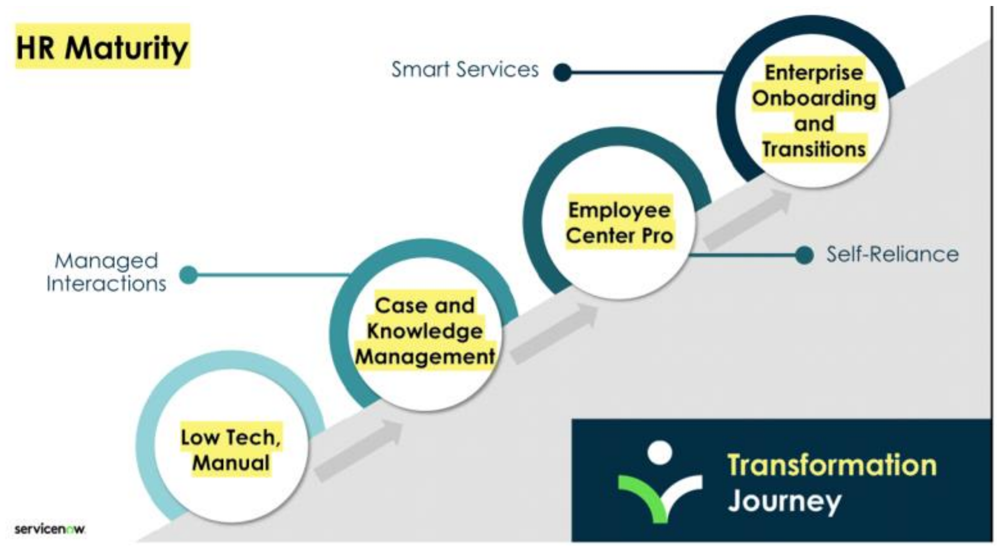

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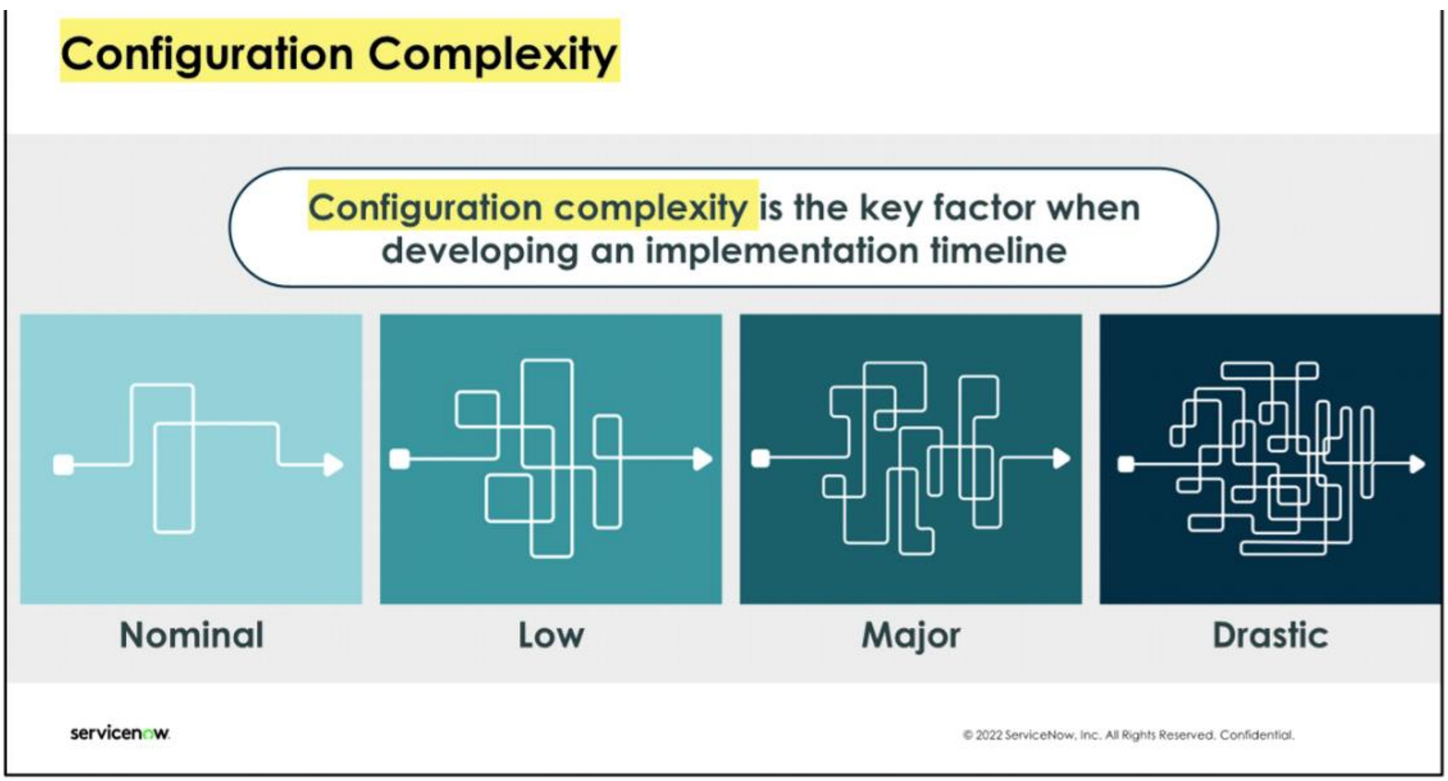

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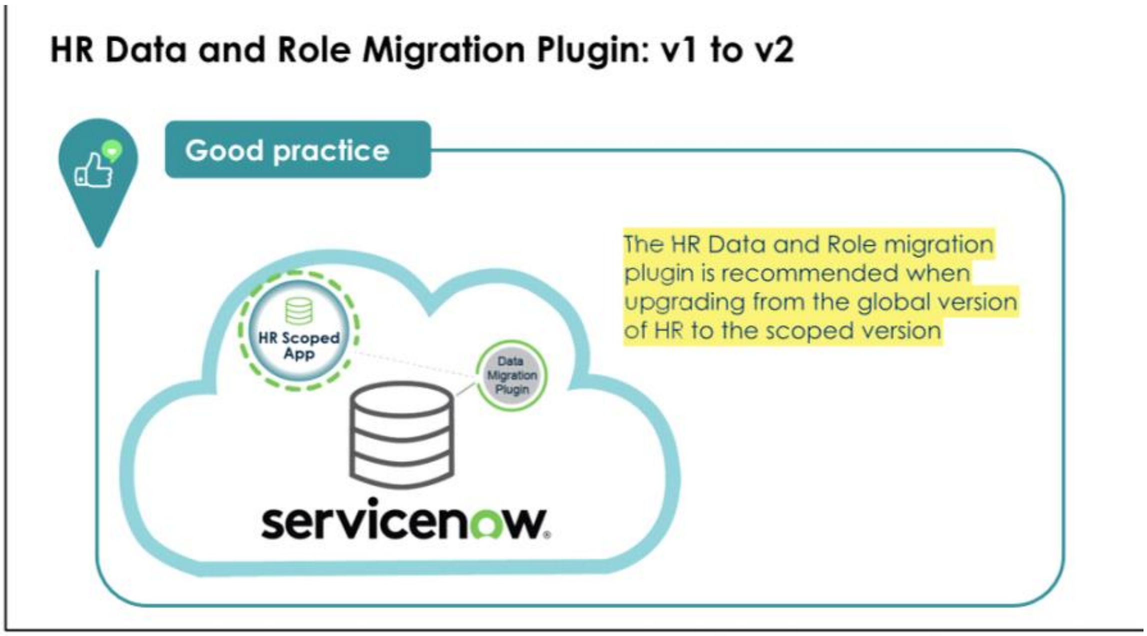

This information is not relevant for a new implementation. Implementers need to be aware of the Human Resources Scoped App: Data Migration [com.sn_hr_migration] plugin because there are still many ServiceNow customers using the legacy (v1) version of the HR product.

Note: HR Migration does not migrate all data from the global version to the scoped version.
Not included in the migration are:

- ✓ Business rules
- ✓ Cases
- ✓ Catalog
- ✓ Categories
- ✓ Data policy
- ✓ Email actions
- ✓ HR services
- ✓ Knowledge base (connections to case)
- ✓ List/Form layout changes
- ✓ Record producers
- ✓ Reporting and Dashboards for cases
- ✓ Scheduled jobs
- ✓ Script includes
- ✓ Service Portal changes in global version
- ✓ Skills
- ✓ Templates
- ✓ UI actions
- ✓ UI policy
- ✓ Workflows

All employee related data except the cases and roles. No configurations.

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Guided Setup

The HR Guided Setup wizard provides a sequence of tasks that can be used to configure the HR application

Category View	Task View	Configuration View
Displays the configuration categories and their tasks	Displays a list of Tasks for a specific Category	Displays the forms, lists, or properties of Tasks for a Category

Screen clipping taken: 9/30/2022 5:51 PM

HR applications may be configured directly in each application or using the HR Guided Setup module. HR Guided Setup organizes configuration activities into categories. In each category, groups of pre-defined tasks are listed. As tasks are marked complete, the completion percentage updates accordingly.

After configuration tasks have begun, the Continue button displays instead of Get Started.

There are several views of the HR Guided Setup module:

- **Category View:** displays an overview of each of the configuration activities.
- **Task View**: displays details of the configuration tasks. It also provides controls to start, skip, mark as complete, or unlock tasks. Tasks can be marked as complete after you complete the required configurations or beforehand to accept the default configuration settings.

NOTE: Some tasks may be locked because they require a plugin to be activated. You can click **View plugins** to enable the plugin, then you may unlock the task.

- **Configuration View**: set configurations through the corresponding forms, lists, properties, etc. It also provides access to contextual embedded help, contextual documentation on the ServiceNow product documentation site, and guided tour (if available for an activity).

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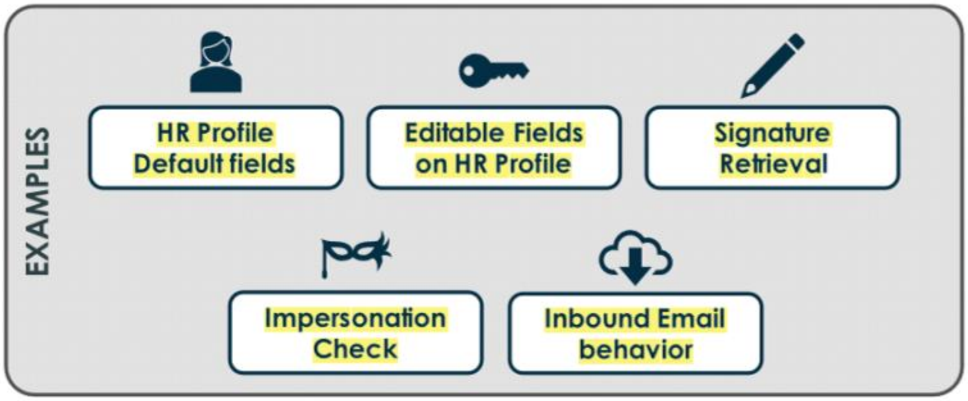
HR Administration > Properties

The HR Properties module allows HR Administrators to control the overall behavior of the HRSD application



- **HR Profile Default fields:** Fields that appear on the Generate HR Profiles page. Any field from the HR Profile [sn_hr_core_profile] table may be used.

- **HR profile fields editable by users**: This is especially important when integrating with a third-party system. For example, if the customer plans to only utilize an inbound integration for HR Profile data, none of the profile fields should be editable in ServiceNow. However, if they plan to use a bi-directional integration, more fields may be editable. This will be discussed further when HR Integrations are detailed in this course.

- **Signature Retrieval**: Check Yes to enable signature retrieval; allowing users to save their digital signatures for reuse. If true, retrieves the latest signature image for a user and shows it by default when the user navigates to the signature pad.

- **Impersonation Check**: If a user with higher access impersonates an HR professional, they will be unable to view or edit sensitive information.

- **Inbound Email behavior**: determines if an email to HR is converted into an HR case. When checked, the system will automatically create an HR Case from an inbound email.

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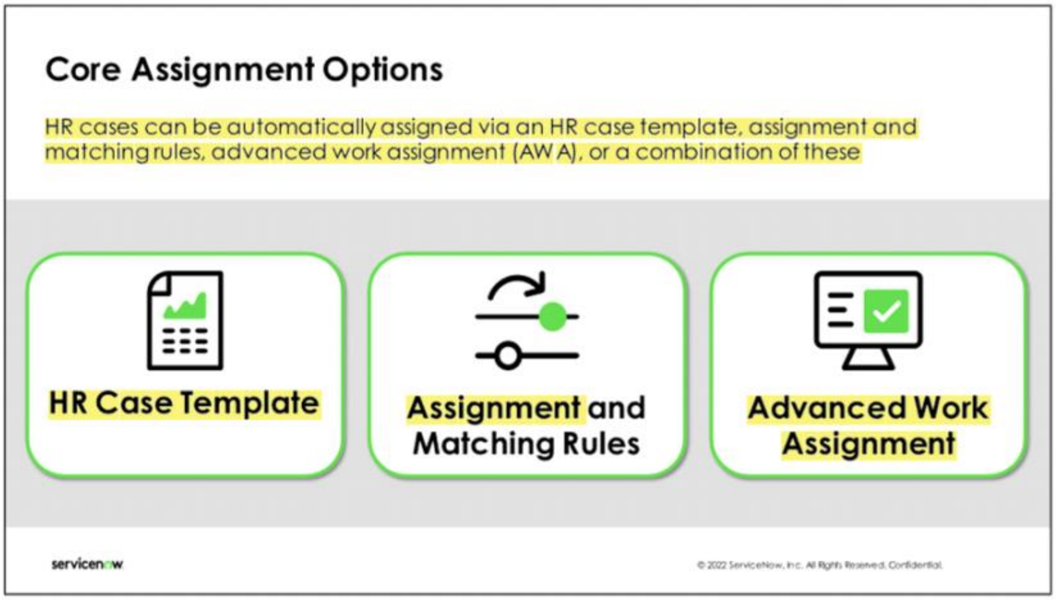

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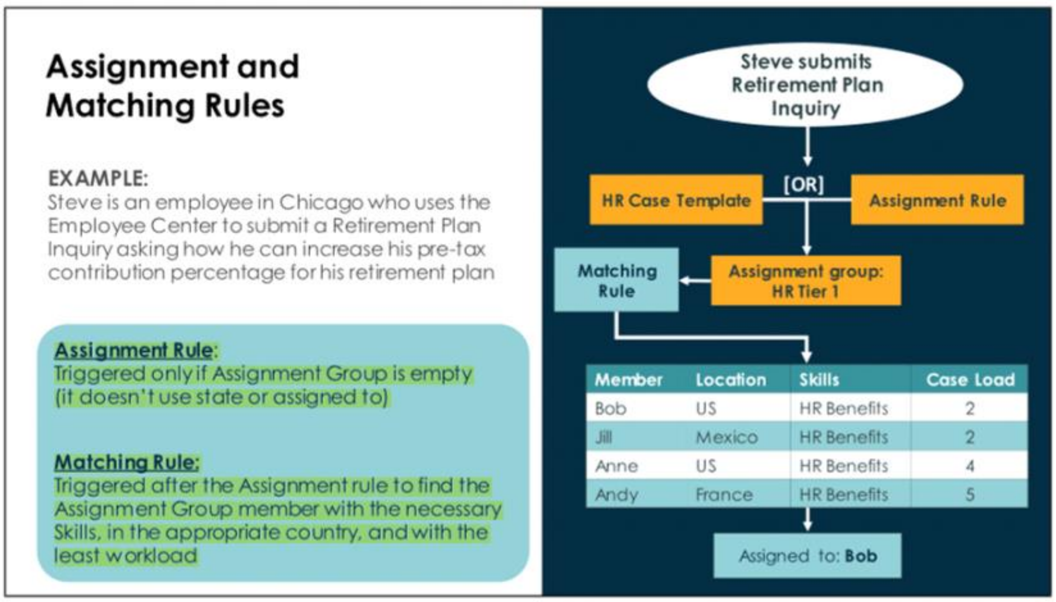

The HR Case Template associated with the HR Service defines the Skills needed, but not an Assignment Group. The system follows this process to assign the Case:

1. The **HR Total Rewards Case** Assignment Rule assigns the Case to the HR Tier 1 Group.
2. The **HR HR Total Rewards Case, Agents by skills and country** Matching Rule runs a script to create a list of possible assignees.
3. The Case is assigned to Bob, who has the right Skills, is in the United States, and has the least Case load.

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The HR Case Template associated with the HR Service defines the Skills needed, but not an Assignment Group. The system follows this process to assign the Case:

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2. The **HR HR Total Rewards Case, Agents by skills and country** Matching Rule runs a script to create a list of possible assignees.
3. The Case is assigned to Bob, who has the right Skills, is in the United States, and has the least Case load.

Assignment Rules: Assignment Rules are triggered based upon a table and a condition. HR provides Assignment Rules for all OOB COEs and they are set to trigger when the assignment group is empty. They set the Assignment Group to "HR Tier 1".

Matching Rules: Matching rules use the Resource Matching Engine [com.snc.matching_rule] plugin that is automatically activated with the HR Core plugin. The Matching Rules engine is invoked by tThe Auto Assign business rule on HR Case. That BR is trigged based on the HR case State, assignment group not empty, and assigned to is empty. When Auto Assign is triggered, the matching rules logic obtains a list of agents who could be assigned to the Case. The number of agents returned is based on a parameter that specifies the length of the list. The default is one. Each HR table and task in the base instance has two matching rules: Agents by skills and country and Agents by skills. The higher priority rule is the match by skills and country.

- If this matching rule does not find eligible agents, then the condition of the lower priority rule is still true and attempts to match by skills alone.
- If the higher priority rule finds an agent, the assigned to field is no longer empty and the secondary rule does not match.
- Either the getAgentsByCountryAndSkillsOrderLeastLoaded or getAgentsBySkillOrderLeastLoaded in the hr_AssignmentAPI script include are called.

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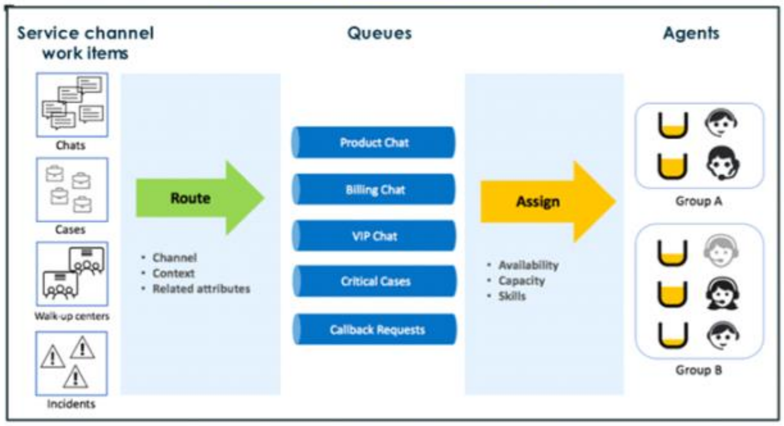
Advanced Work Assignment

The ServiceNow® Advanced Work Assignment (AWA) feature automatically assigns work to agents based on their availability, capacity, and skills



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AWA is an alternative to using HR templates, HR assignment rules, and HR matching rules. AWA pushes cases to qualified HR agents using work item queues, routing conditions, and assignment criteria. HR agents see their assignments in their inbox. You can set the capacity for an agent, which is the number of work items on a particular service channel that an agent may actively work on.

You can also set assignment rules to determine how AWA routes work items to a group of agents. If an agent rejects a work item, the item is rerouted to another agent.

Basic process for configuring AWA:

Users with the awa_admin role determine:

- What to route – Configure the base service channels to be used.
- Where to route – Define the work item queues and the routing rules, execution order, work item sort order, and strategy
- How to assign work items – Define the assignment rules that determine the work items pushed to agents
- What the agent sees – Set the inbox card layouts and presence (availability) states that agents use in their Agent Workspace inbox.

For details on installing and configuring AWA for HRSD, please see the product documentation.

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Advanced Work Assignment

Tips and tricks

To use Advanced Work Assignment, you must do the following:

Ensure HR Templates do not identify assignment groups or skills

Deactivate existing HR Assignment Rules and HR Matching Rules

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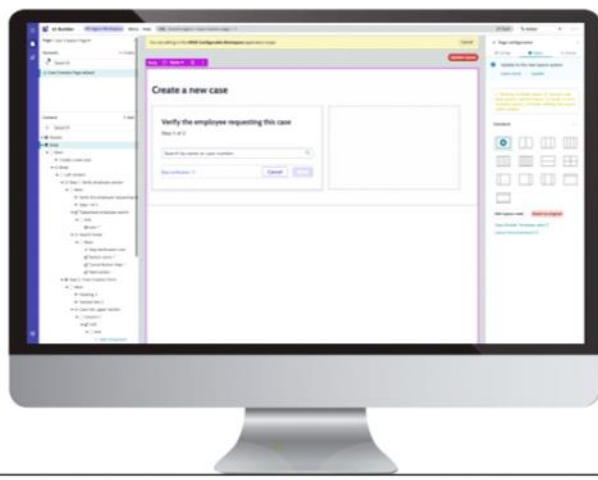
Configure and Customize HR Agent Workspace

HR Agent Workspace Guided Setup organizes configuration activities into categories

There are two methods to configure the workspace:

1. Use the UI Builder to build your workspace
2. Use the Guided setup



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Store app: **Agent Workspace for HR Case Management** (com.sn_hr_agent_ws)

Using the UI Builder, HR Admins can configure data, components, and entire layouts. Modify the built-in pages with new components or extend with your own. There are hundreds of configurable components available for use.

Note: Existing customers can use the Classic Agent Workspace and Configurable Workspaces at the same time if desired.

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Customers using Employee Relations can integrate those cases it into their workspace. Employee Relation cases contain very sensitive topics in which only a few hr agents should have visibility to. The configurable workspace can utilize variants using audiences to limit visibility from agent to agent.

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1. **HR Administration > HR Services > Manage HR Catalog**.

2. Select the **Talent Management** Category from the All Catalog Categories list, then click **New Catalog Item.**

3. Complete the form as shown:
   a) Name: **Work Visa 2**
   b) Short Description: **Please complete this form to request a work visa**
   c) Case Type: **HR Talent Management Case**
   d) Topic Category: **Talent Management**
   e) Topic Detail: **Work Visa**
   f) Assignment Group: **HR Talent Management**
   g) Priority: **4-Low**

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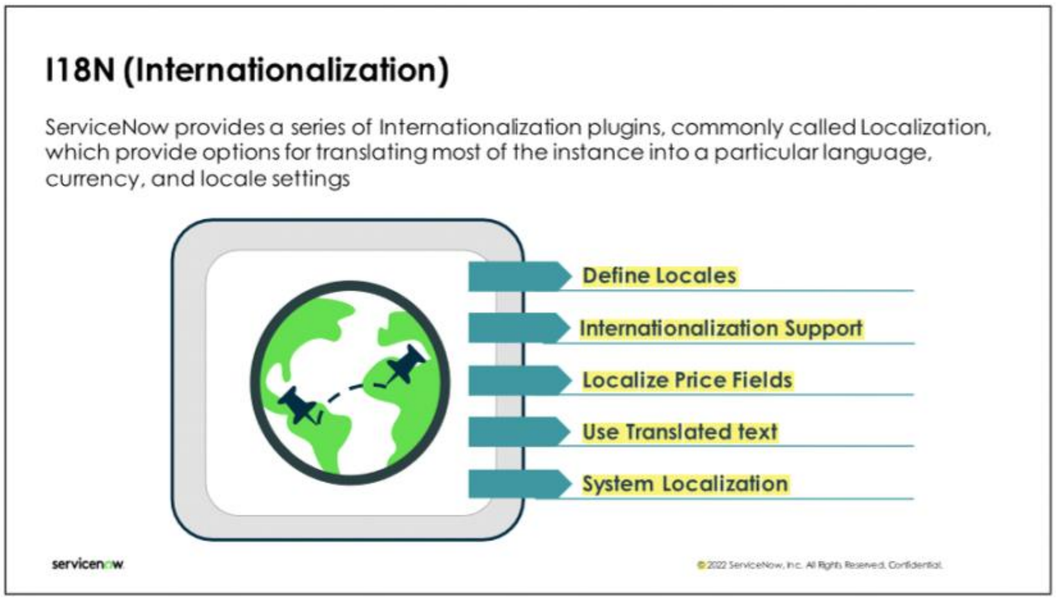

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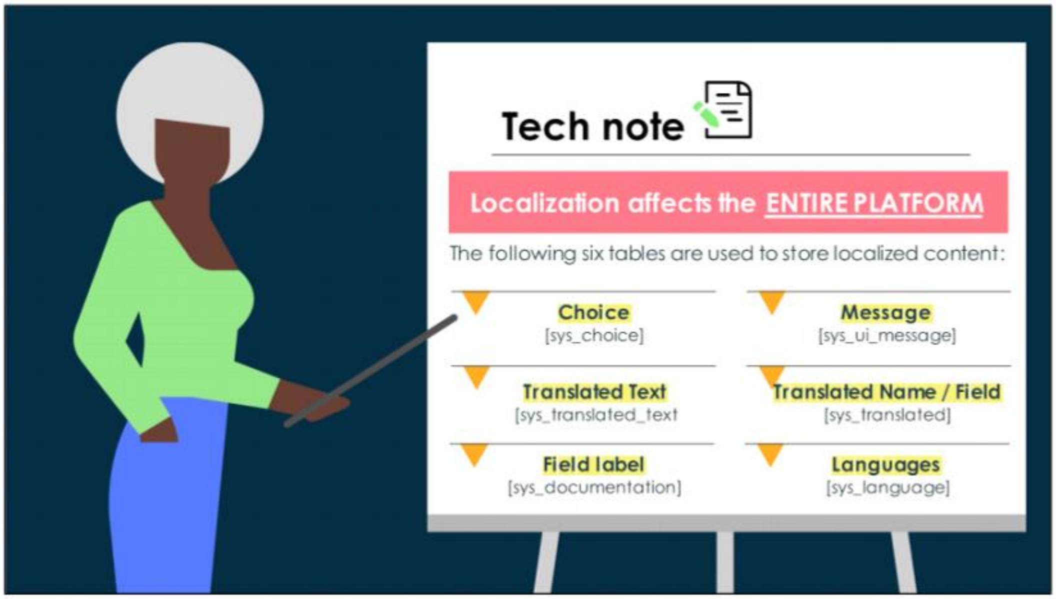

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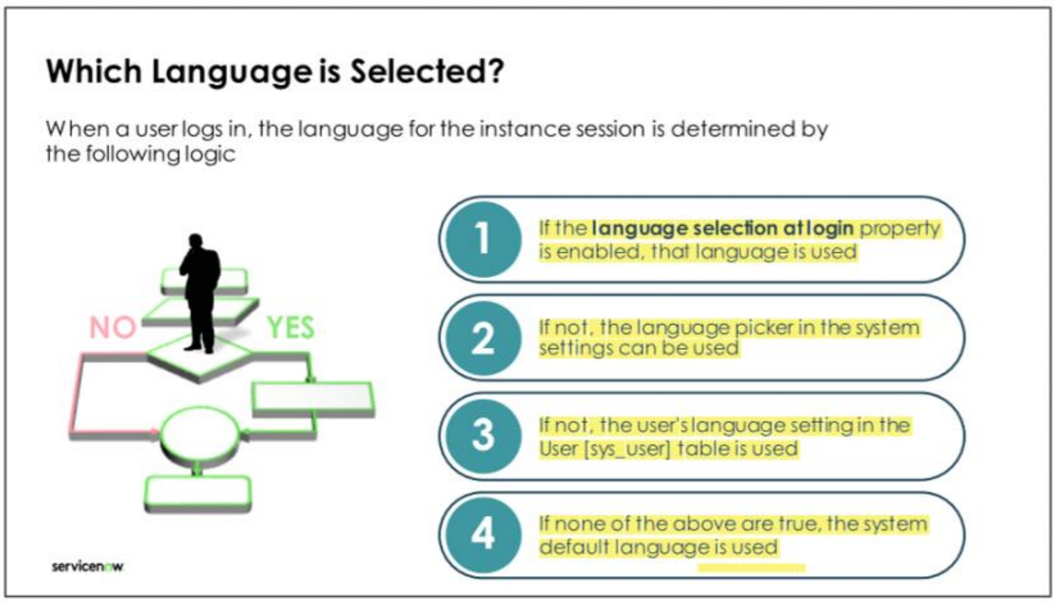

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Text can expand or shrink up to **300%** when translated

Language	Translation	Ratio
Korean	조회	0.8
English	**views**	**1.0**
Chinese	次檢視	1.2
Portuguese	visualizações	2.6
French	consultations	2.6
German	mal angesehen	2.8
Italian	visualizzazioni	3.0

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Translation for HR Templates

Tech notes

Enable translations on HR case and task templates so employees can view the short descriptions and descriptions of their HR cases and tasks in their preferred language.

For global use, you can provide the descriptions for translations in multiple languages so that users can view the short descriptions and descriptions of their HR cases and tasks. You can then update the corresponding HR service to use case headers that support the use of global descriptions.

Note: Make sure to provide global descriptions for each supported language. You cannot select the **Use global descriptions for translations** option within a single HR template for some languages and not others.

For more details, visit the Product Documentation site on Translations for HR Cases and Tasks.

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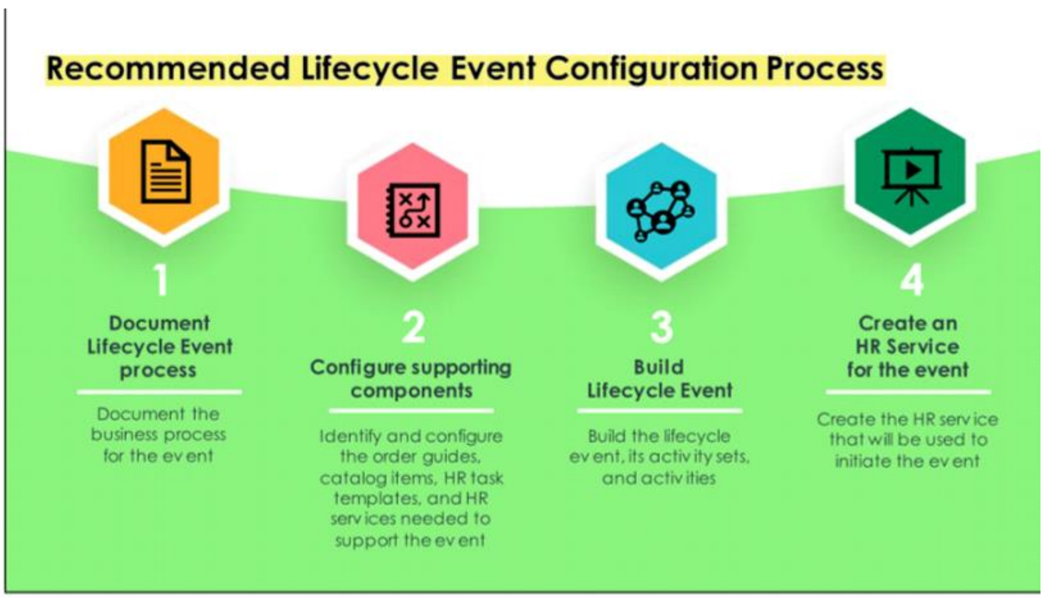

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The **Activity Set Trigger Conditions** field tells the system when an Activity Set should begin and Business Rules control the behavior.

Options are:

- **Immediate** – Activity Set triggers when the Case is created.
- **Date** – Activity Set triggers before, on, or after a specific date. Additional fields are displayed to define the date calculation. Please note that the date offset unit uses calendar days for its calculation.
- **Other Activity Sets** – Activity Set triggers after one or more Activity Sets have completed.
- **Advanced** – Activity Set triggers according to the conditions defined in the Trigger Script.
- **Condition** – Activity set triggers according to conditions defined using the condition builder.
- **Combination** – Activity set triggers using a combination of any of the other trigger conditions.

Note: As of San Diego release, there is a mechanism available to ensure timers within a workflow trigger automatically rather than wait for the evaluation interval to trigger.

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Activity type

- Approval
- Employee task
- Fulfiller activity
- Notification
- Flow
- Content
- Activity Container

Screen clipping taken: 9/30/2022 9:29 PM

Audience records are used for several purposes:

- Determines what an employee may view on the Employee Center
- Determines for which employees to trigger a Lifecycle event activity set
- Determines for which employees to trigger an activity on a Lifecycle event
- Defines when new hires are displayed on the org chart page and the My Team widget in the Employee Center

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Notes:

- Member activities inherit the audience of the activity container.
- Member activities trigger based on the order number assigned. Activities with the same order number will be triggered at the same time.
- New member activities must be created for each activity container. You cannot move existing activities into an activity container, nor can you move member activities out of the container to use as standalone activities.
- Member activities cannot be activity containers. You cannot place an activity container inside another activity container.

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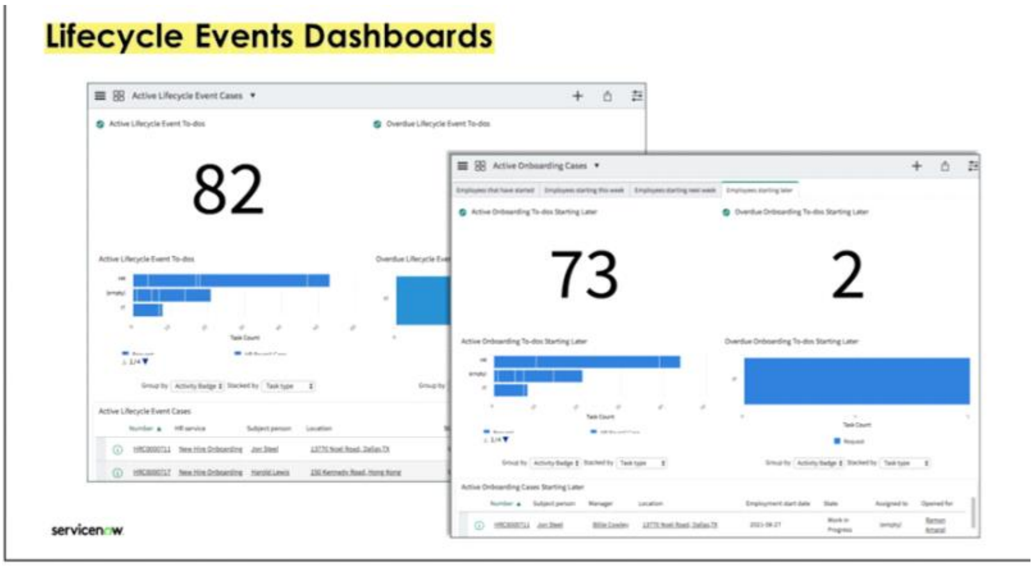

Lifecycle Event Managers and fulfillers can track the progress of Lifecycle Events and Onboarding Cases using the Lifecycle Events Dashboards. There is a dashboard showing results for all active Lifecycle Events and another specifically for Onboarding Cases. The Onboarding dashboard is further divided by employee start date.

NOTE: If the customer has licensed Performance Analytics Premium and the Performance Analytics – Content Pack – Human Resources Lifecycle Events Scoped App [com.sn_hr_lifecycle_pa] plugin has been activated, they may also view the Onboarding Executive View dashboard.

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Employee Experience Packs are update sets which may include pre-built services, activities, and communications. They serve as a blueprint for HR services, Lifecycle Events, or other processes and may be configured to the customer's needs.

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ServiceNow Store: Journey Accelerator

Tips and tricks

Journey Accelerator plans may be automatically created from a lifecycle even

Journey Accelerator is a ServiceNow Store application that allows administrators to create templates for plans and to-do tasks. Managers then use the templates to create and publish customized plans for key employee transitions. Managers, employees, and mentors can access the plans from the Employee Center.

There is an HR task type that may be used to create the Journey Accelerator plan. It will map the subject person, plan type, and publish date from the lifecycle event to the plan.

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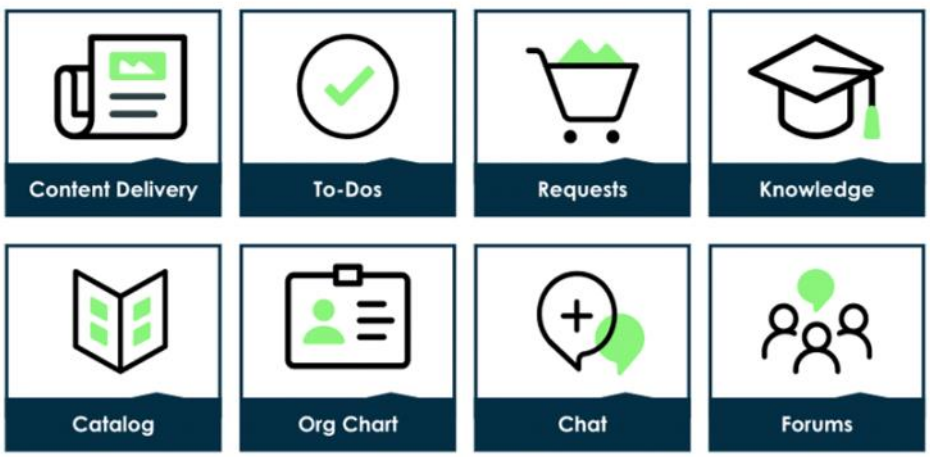
Course prerequisite review

Employee Center Content

HR admins can configure information displayed on the Employee Center



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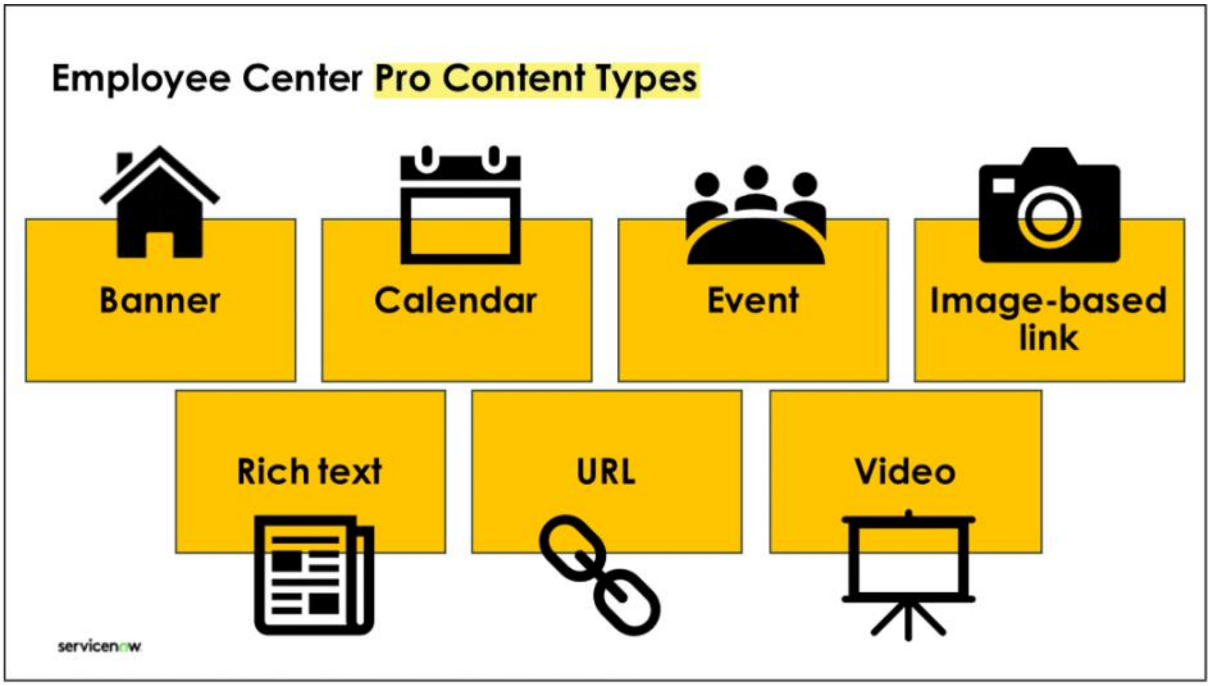

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Campaigns

Content Automation, or Campaigns, uses Content Delivery to present employees with targeted communications during a predetermined timeframe

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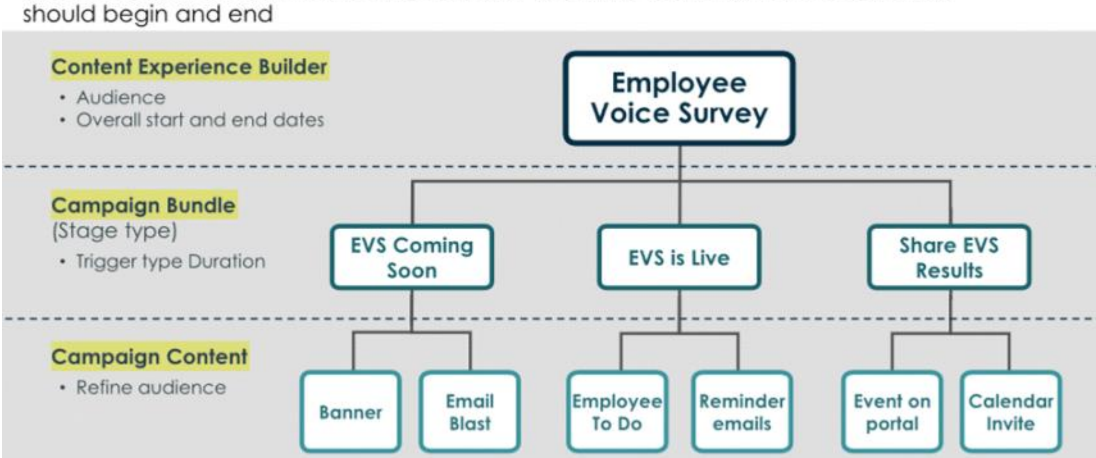
Plan Campaign Structure

Before creating the campaign, Lilah documents what needs to be shared, how it should be distributed, who should see it, and when the campaign and each stage should begin and end



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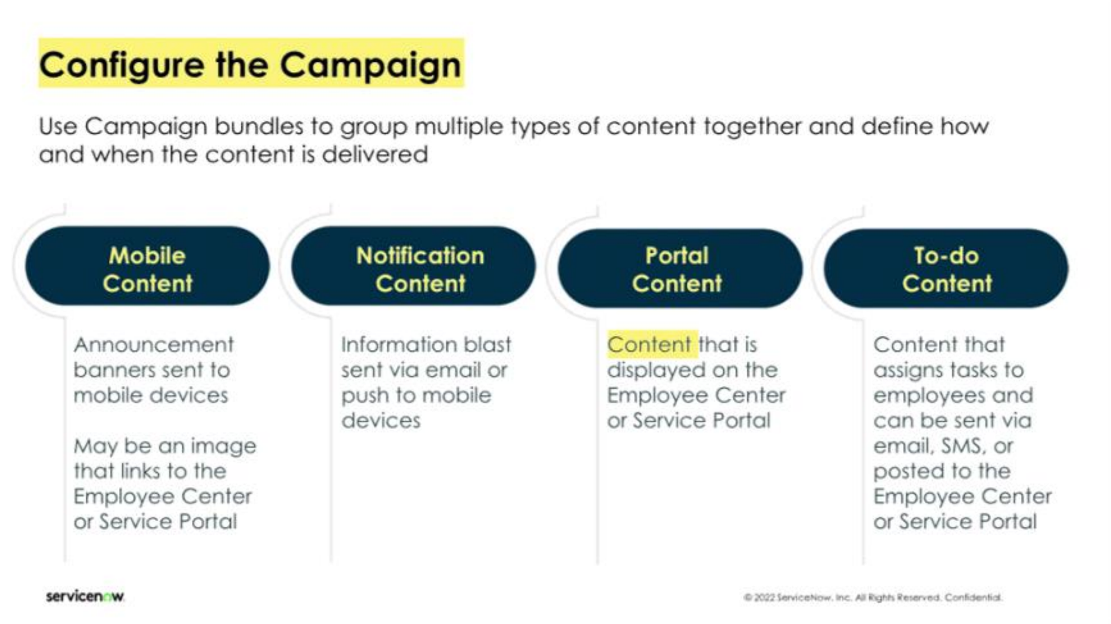

When creating a campaign, you may create the stages first and then add content or create content first and then build the campaign and its stages. The Campaign Builder, on the Schedule of content tab supports either option.

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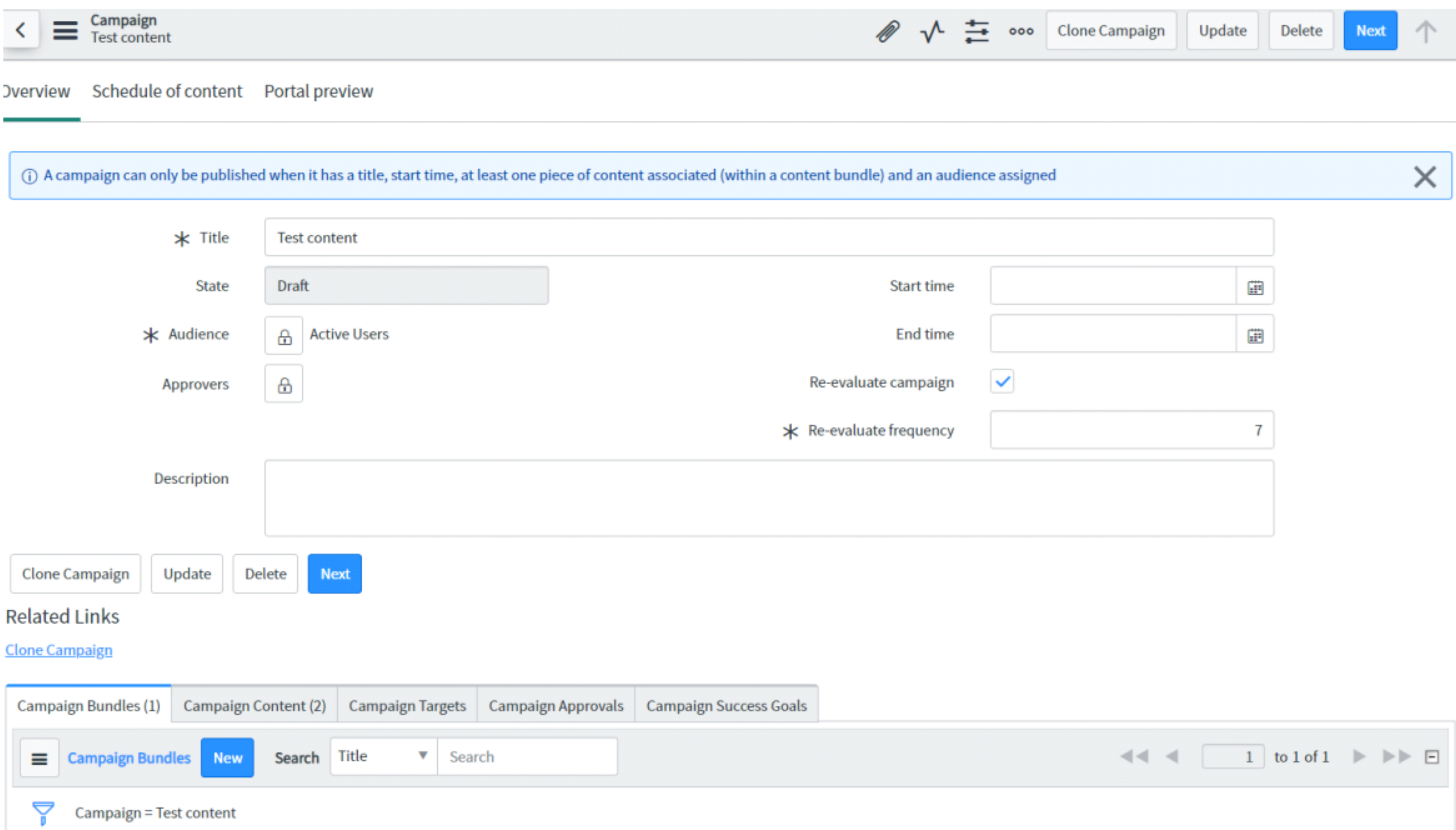

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Audience records in the Content Delivery application are used to define the conditions or criteria users must meet to see content. Each audience record is configured based on user conditions, user criteria, HR profile conditions, HR criteria, or an uploaded file.

NOTES:

- After a campaign is in the Published state, you cannot add users. To add new users to a published campaign, click the Edit Campaign button. Or go to the specific content of a campaign and use the Refine audience field.
- The Re-evaluate field allows the system to review the audience for a campaign and remove employees that no longer satisfy the criteria. It uses the Content Automation: Update Campaign Audience scheduled job. You can select whether or not to reevaluate the audience and how often, in days.

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What the campaign is trying to accomplish determines how if should be set up. Is your campaign intended to:

- **Deflect**: For example, you are trying to prevent employees from creating more Inquiry cases
- **Drive action**: For example, you are trying to drive employees to sign up for health benefits
- **Provide communication**: For example, you are sharing information about an upcoming benefits change or offering

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Campaign success goals

The Content Automation: Evaluate Campaign Success Goals scheduled job runs daily.

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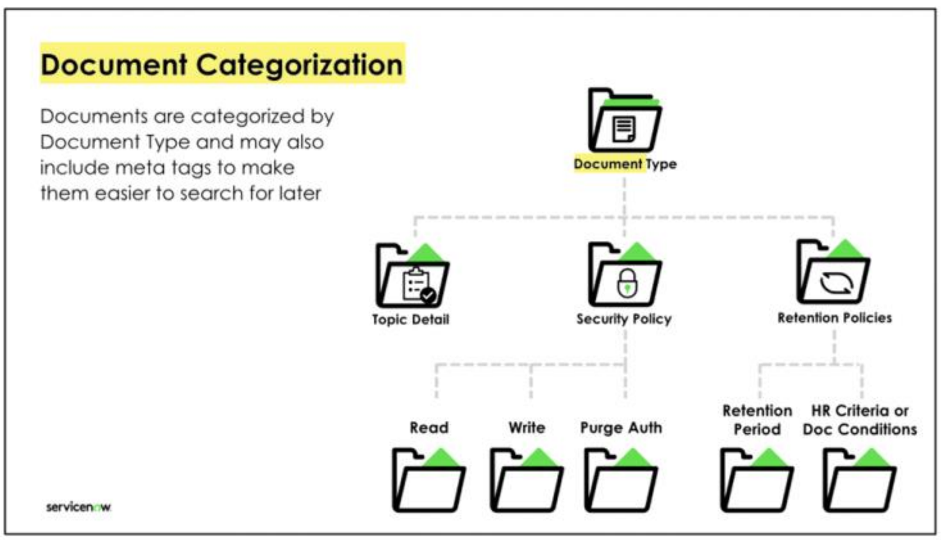

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Purging:
There are several schedule jobs built into the base instance that tell the system which employee documents to purge and when. These jobs are run every day at the same time and a system administrator can configure the timing.

When documents are purged, details of that purge are listed in the purge logs module.

The employee documents Properties page allows the document management administrator to identify how often purge dates are recalculated for employee documents and the number of days before the next month a purge notification will be sent. By default, notifications are sent one week before the end of each month to notify about purges that will occur in the next month.

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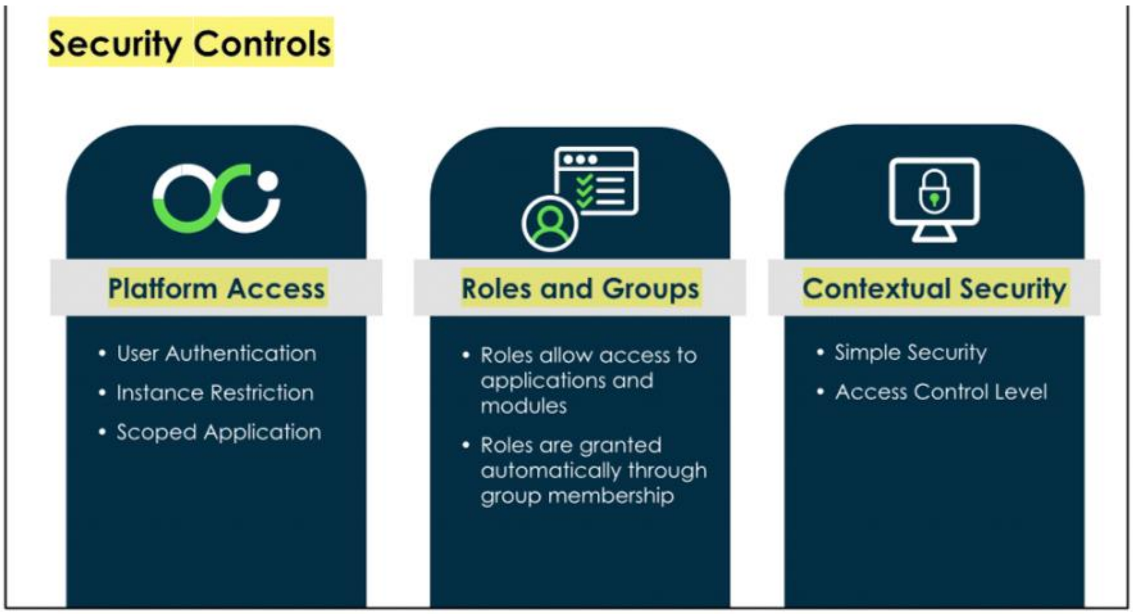

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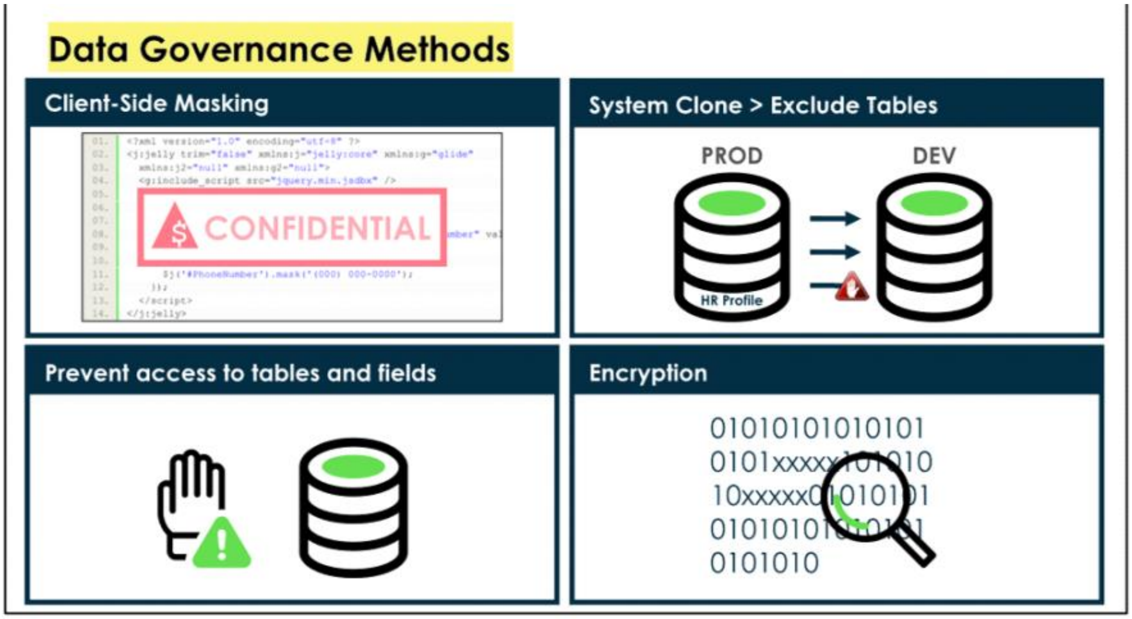

Client-Side Masking (encryption) can prevent users from entering personal information in an HR Case. Create a new UI Macro to reference jQuery along with using the input mask plugin.

Exclude Tables: When cloning an instance, exclude the HR Profile table so that it is not copied into non-production instances where HR may have less control over security and access.

Prevent access to tables: ACLs can be written that limit access to tables. For example, if a Shared Service Center should only access the Payroll table, other tables can be made inaccessible to them.

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Encryption: Encryption (plugin required) is a process that scrambles information into a format that unauthorized parties cannot decode or use. The encryption process requires an administrator to grant an encryption context to a role and all users with that role will have access to the data. After encryption, text fields and attachments are no longer accessible by database tools and cannot be indexed. In addition, users cannot add encrypted fields to a filter. You can encrypt all String fields, including fields provided by default in the system and new fields that you create in the dictionary.

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Granular Delegation

Granular delegation allows employees to delegate their tasks to other employees for specific date and time ranges based on delegation rules

Delegation may be completed by the employee or by a user with the delegation_admin role:

Employee Delegation	delegation_admin
➢ From the employee's profile on the Employee Center they can delegate their assigned tasks ➢ Selecting **New** from the **My Delegates** form	➢ Using the **Create New Delegate** form ➢ Selecting the **Delegates** tab from a delegation rule and selecting **Edit**

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Granular Delegation with the HR Service Delivery base system supports the HR task [sn_hr_core_task] table. Along with filter conditions, you can filter delegations for delegators and delegates. Access control rules (ACLs) in HR Service Delivery were modified to look for the Assigned to person on an HR task. Other domains that want to use Granular Delegation must modify their ACLs to use this feature.

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Control and Security:

- Delegated development helps ensure that developers may only access the scoped tables and application code is contained within the scoped app

Training:

- There is a smaller learning curve because delegates only need to learn about their specific application

Scope Protection:

- Runtime scope protection invoked every time business logic is executed
- All scriptable interfaces enforce runtime protection
- Offending scope and scripts are clearly indicated

Public and Private APIs:

- Ability for every app to define public and private APIs using the **Accessible from** field

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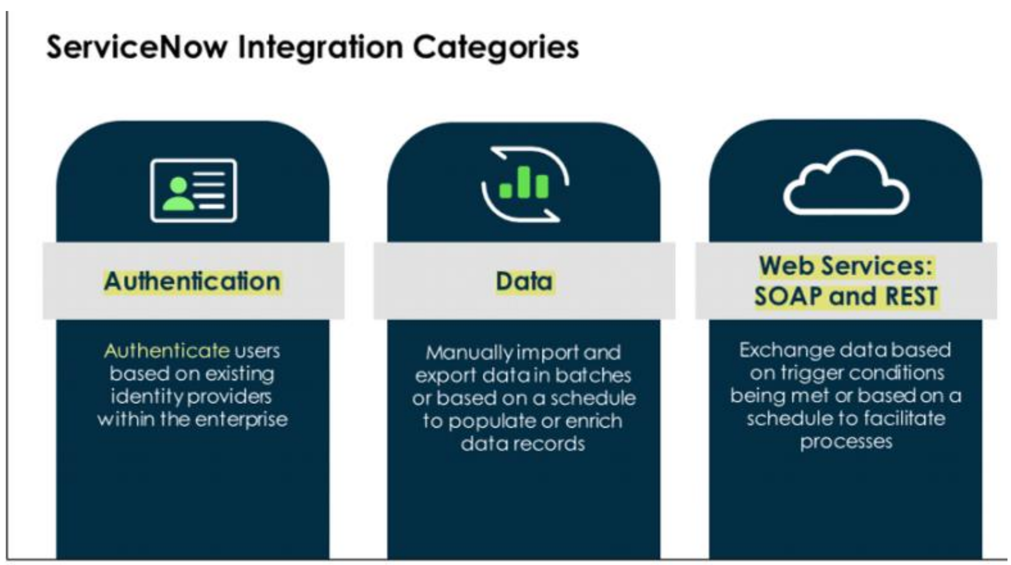

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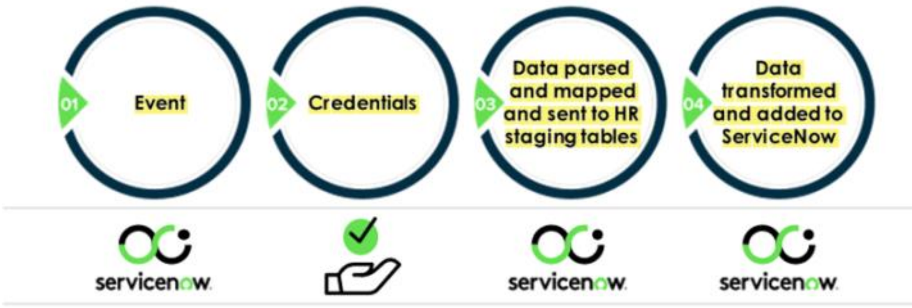
With an inbound integration, data is pulled from the third-party HR management system to the HR tables in ServiceNow



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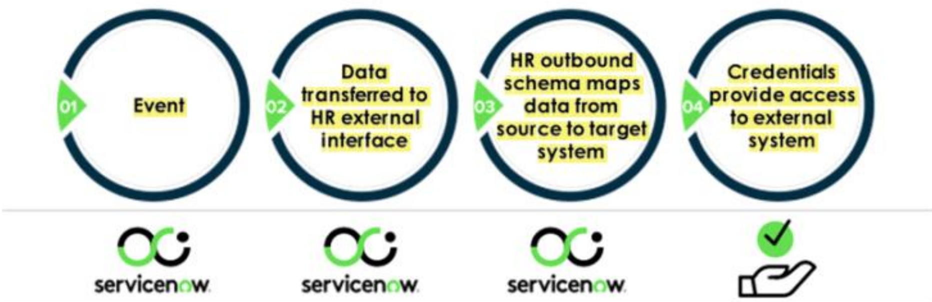
Outbound HR Integration Process Flow

With an outbound integration, data is pushed from the HR tables or HR service in HRSD to the third-party HR management system



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Provide Source Credentials

Provide the source and SOAP credentials for the First Advantage service so that it can be accessed for integration

Verify integration

Verify the preconfigured settings and determine whether they meet business needs or if further customization is required

Add background check packages

Add one or more background check packages to your instance so they can be accessed when a request for a background check by First Advantage is made

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1. **(Sources) Configure source credentials for the HR management system:** Configure the source credentials for the third-party HR management system so that it can be accessed for integration. So the third-party HRMS can be accessed for integration, you must provide SOAP or REST credentials, including the endpoint URL, user name, and password. If needed, you can also configure the source properties, additional inputs, and source versions.
2. **(HR Integration Service) Configure inbound integration for information coming from the HR management system:** Configure the inbound integration to pull data from the third-party HR management system to the HR tables in HR Service Delivery. As part of this, you must configure the HR integration service, web services, service mappings, schema mappings, and transform maps. NOTE: If you need to create a new staging table, make sure it is an extension of the core HR Integrations Staging [sn_hr_integrations_staging] table.
3. **(HR Integration Outbound Service) Configure outbound integration for data being pushed to the HR management system:** Configure the outbound integration to push data from the HR tables or HR service in HR Service Delivery to the third-party HR management system. Depending on whether data is pushed from the HR tables or HR service, you must configure the HR integration outbound services or HR service, web services, service mappings, and outbound schema mappings.
4. **(HR Integrations Schedule Job) Configure the integrations job that will trigger the event:** Configure the integrations job to synchronize data between HR Service Delivery and the third-party HR management system on a scheduled or on-demand basis. You can also perform dry runs to validate data or troubleshoot and debug the integration on an as-needed basis.
5. **Perform dry runs:** Perform dry runs to validate the data or troubleshoot and debug the integration on an as-needed basis. Dry runs pull data into the staging tables but not into the target tables.

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Enterprise Service Management Integrations Framework

Enterprise Service Management Integrations Framework, available from the ServiceNow Store, provides a way to build HR integrations using the Flow Designer

Common Use Cases:

Pulling employee profile information	Pulling to-dos	Pulling other data from third-party applications

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HR Integrations Module or Integrations Framework?

HR Integrations Module	Enterprise Service Management Integrations Framework
• Multiple integrations are pre-built in the platform • Leverages SOAP and REST API • HRSD customers are automatically entitled • Installed with HR Core	• Available on ServiceNow Store • HRSD customers entitled to HRSD use case, but not to the Spoke itself • Modifications or custom Spokes require **IntegrationHub Enterprise** entitlement

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