Human Resources – Quick Flow Demo Card

SMA-X 2017.11

# Background

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| Key Messages | * Intelligent self-services, social, engaging UX – encourages employees to actually use ESS & to find own solution or guides them *to* solution; along with automation, this reduces load on HR * Custom workflow for HR requests to expedite handling of typical questions from employees * Superior KM powered by Micro Focus’s Big Data platform, yet as easy and as engaging as Facebook or Twitter * Unlimited # end users included with cost of SAW service (other vendors charge beyond certain #, and charge for approvers) and no extra charge for HR functionality |
| Customer Challenge | * HR can’t keep up with demand – service suffers * Need a new system of engagement that enables HR to mine knowledge, create business insights. |
| Engage Them | * Looking to reduce the number of requests that require agent handling? * Employee self-service (ESS) tool today? Used consistently? * How is your organization learning from experience? Are you managing knowledge? * Consolidate HR service desk tool with IT service desk tool to lower costs |
| Differentiators | * Single tool to support both IT and HR requests with domain separation lowers operational costs. * Separate, simpler workflow for expediting typical HR requests. * Leverage public requests, Q&A, and Knowledge suggestions for common questions to decrease resolution time and call volume. |

# Quick Flow

The goal of the Quick Flow demo card is to provide a benefit oriented *overview*, to *introduce* the customer to value and solution. It should be completed in ~5-10 minutes; optional sub-flows to demonstrate more of the solution may be included below. Make sure your demo environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide during the demo.

Features demonstrated:

* Self-service for HR knowledge articles and collaboration
* Self-service to create an HR request
* Fulfill an HR request
* Encrypted Employee ID field
* Private Domain ticket
* Close HR request

| **Do** | **Say** | **Cheat Sheet** |
| --- | --- | --- |
| **Self-service for knowledge articles and collaboration**   * Login as amy.lopezmf in ESS (in new window) * In the Search bar start typing “am I eligible” – pause to let proactive suggestions appear (don’t press Enter) * Finish typing and execute the search | * Walk up and use, no training, uses familiar interactions of modern solutions * Proactive, natural language search; language recognition algorithms; in the background already searching while typing. | * F11 for full screen mode * “am I eligible” |
| * Results list * Quick highlight of the sources in SMA-X | * Powered by the use of Micro Focus Autonomy. Strength is it’s a ubiquitous search across multiple sources: Knowledge, Offerings, Public Requests, Ideas. * Different colors for specific sources that Service Anywhere is currently leveraging | * Results list |
| * Select the “FMLA Eligibility” article * Rate it (helpful) * Review the comments on the article and/or add your own comment | * Rich formatting, rate solution improves KB; right side – good example of unstructured data (we don’t keep the relationship, shows because content is similar) * And it’s self-learning – searching and rating improves the suitability of results for future searches | * “FMLA Eligibility” article * Rate helpful * Review/add a comment |
| * Smart Search may sometimes offer the user question in the right hand pane or in the results list:  “I have 12 months of service with my employer, but they are not consecutive.” | * Self-service can reduce calls to the HR Service Desk – user was able to find an article and ask friends without intervention. * You can see how SMA-X’s self-service component, specifically the easy and relevant knowledge search and social crowd-sourcing of answers, in the same portal as all other business services, can bring users to answers quickly, reducing traffic to the agents. | * Read user question: “I have 12 months of service with my employer, but they are not consecutive.” |
| **Self-service to create a request**  *Transition now to create a request for a passport*   * Search “I need a passport” or Browse Categories for the Human Resources category * Select “Request ELETTER for Passport application” * Add business justification * Submit | * Of course there will always be requests to HR – and even that is more efficient with SMA-X: presented the correct user options to capture a minimal amount of data so this can be auto-categorized and auto-assigned thereby reducing manual effort and expediting routing of the call to the right workgroup. | * Request ELETTER for Passport application * Business justification * Submit |
| **Fulfill a request**  *Transition now to the agent interface where we will fulfill this request*   * Login as an agent, Jennifer.falconmf and go to the Request module * Select “HR Support Requests” view * Select the Passport request you created above * Show the workflow tab. It should be in the Fulfillment metaphase. (The offering has filled in the fields required to move it to the Fulfillment meta phase automatically: Impact, Service, Service Desk group ) | * HR requests are separate from IT requests: separate workflow, rules, and forms are supported. (show any IT Support request for comparsion?) * The out-of-the-box workflow is simplified to support common HR question handling to expedite handling and closing the requests. | * “HR Requests” view * Select your request from above |
| **Encrypted Employee ID field**   * Employee id is an encrypted field (it is in “show more” part below description field on general tab), click on it and enter passcode to view/update the field to set employee number to 111111 (If prompted, enter passcode: Password\_123) * Save | * Encrypted fields can protect private information such as employee number, social security number, salary, etc. * The offering will automatically assign request to the Human Resources group * Jennifer who is part of the Human Resources group can see the request * Jennifer can also see the Employee ID encrypted fields’ value using her passcode. * Jennifer needs to speak with Amy to get her employee number to fulfill the request. | * Jennifer.falconmf * request is visible to Jennifer * encrypted field is visible and editable to Jennifer with passcode * Update Employee ID value (with passcode if prompted) * Save |
| **Private Domain**   * In a different browser window, login as Kimberly.quanmf and she will not be able to see the request as she is not a member of any groups in the Human Resources domain | * Kimberly Quanmf is an agent but she is not in any groups that have access to the Human Resources domain so she can’t see the request. | * Login as Kimberly.quanmf and she won’t see this request |
| **Close the Request**   * As Jennifer, enter the solution and completion code * Save, and the request will be automatically closed. | * The out-of-the-box workflow is simplified to support common HR question handling to expedite handling and closing the requests. Simply enter the Solution and completion code and the request will automatically be closed. | * Solution * Completion code * Save |

# Optional Sub Flows

Customer intrigued after seeing this overview? Ideas for possible sub-flows/drill-downs:

| **Do** | **Say** |
| --- | --- |
| * Chat with agent after submitting “Request for eLetter for passport application”. Story is that employee will be traveling to multiple countries and needs to know if multiple eLetters will be required or if one can be created for Romania and China. (See ESS quick flow) * Employee satisfaction survey for HR requests (see ESS quick flow) * Public request (see ESS quick flow) | * Chat support provides real-time interaction between the employee and the HR service desk but allows the service desk agent to service multiple employees at the same time, increasing efficiency and customer satisfaction. * Monitor employee satisfaction with surveys to identify opportunities for improvement. * Users can monitor other’s requests for common issues that are not unique to a given employee decreasing redundant requests for better efficiency |

# Demo Preparation

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Initial Set-up

* Create a new view in the Request module for “HR Requests” with a filter for Active=YES and Request Type= HR Support Request and save it as a Public view. (done with imported tenant)
* Create a functional (assignment) group for “Payroll” and add yourself (Jennifer.falconmf) and John.Grynberghr to that group
* Modify the “Request eLetter for passport application” offering to specify Service=Employee and Service Desk group=Human Resources as default values to show auto-assignment. (done with imported tenant)
* Modify the “Have question with payroll?” offering to default Service=Payroll and Service Desk group=Payroll. (done with imported tenant)
* Modify the Check leave eligibility offering to have default values of Service=Employee and Service Desk group = Human Resources Group (done with imported tenant)
* Create a request for offering “Have question with payroll?”

## Per-demo Checklist (in addition to above)

* Remove ‘helpful’ flag from FMLA article