HR Service Management Guide

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Introduction

Human Resources Service Management

Note: *This article applies to Fuji and earlier releases. For more current information, see HR Service Delivery* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

Overview

HR service management uses service management principles to help automate standardized human resources (HR) processes within your organization. HR service management manages the service relationships between HR and employees through an HR service catalog.

HR service management allows:

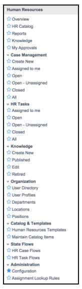
- All employees to use the HR catalog to submit requests to your organization's HR department.
- HR staff to create, manage, and view HR cases to process staff requests.
- HR managers to run reports and view overview information to track and manage work done by the HR department.

Benefits of HR Service Management

- **Configurable flow of requests:** By setting the configuration options, you can tailor the flow of case information through your system, including handling approvals, auto-assignment of agents, and using templates for common requests and tasks.
- **Flexible roles:** By assigning roles from an enhanced list of roles, starting the the Fuji release.
- **Reduced service delivery cost:** By reducing the volume of checklists, email exchanges, and phone calls needed by your organization's HR team for tasks such as employee onboarding.
- **Improved employee access:** By providing employees with transparent access to all HR services through a service catalog, rather than having to write individual emails, make phone calls, or personally visit HR for each request.
- **Track requests and progress:** By using reports and views to help HR managers understand the work being done by their staff to support the company. Employees can also see the current status of their requests.
- **Customize processes:** By creating workflows to accurately model your organization's HR processes, delivering services exactly tailored to your organization's requirements.
- **Integrate with other services:** By using HR service management processes to include both HR tasks and tasks for other teams, giving HR teams significant service delivery improvements.

Menus and Modules

HR service management contains these modules:



- **Overview:** Display an overview dashboard for HR.
- **HR Catalog:** Access HR catalog services to submit an HR request.
- **Reports:** Run HR-specific reports.
- **Knowledge:** Access HR-specific articles in the knowledge portal.
- **My Approvals:** View and edit approvals assigned to me.
- **Case Management:** Create, view and edit HR case records.
  - **Create New**
  - **Assigned to me**
  - **Open**
  - **Open - Unassigned**
  - **Closed**
  - **All**
- **HR Tasks:** View and edit HR tasks associated with HR cases.
  - **Assigned to me**
  - **Open**
  - **Open - Unassigned**
  - **Closed**
  - **All**
- **Knowledge**
  - **Create New**: Create a new HR knowledge article.
  - **Published:** View, review, and update published articles.
  - **Edit:** List all HR knowledge articles.
  - **Retired:** Lists HR knowledge articles whose workflow state is Retired.
- **Organization:** View and edit organization-level information.
  - **User Directory:** Display a list of users.
  - **User Profile:** View and edit a user's HR profile information.
  - **Departments:** View and edit available department records.
  - **Locations:** View and edit address and contact details for each site in your organization.
  - **Positions:** Create and edit position information for employees.
- **Catalog & Templates**
  - **Human Resources Templates:** Create service order templates to update existing HR documents that reuse the same types of information.
  - **Maintain Catalog Items:** Create or edit catalog items.
- **State Flows**
  - **HR Case Flows:** Create or edit state flows for HR case requests.
  - **HR Task Flows:** Create or edit state flows for HR case request tasks.
- **Administration**
  - **Configuration:** Choose the HR features and options you want to use. You may enable approvals, automatic assignment of tasks and requests, add qualification requirements, and enable and configure many different features.
  - **Assignment Lookup Rules:** Define assignment rules for HR cases.

HR service management also adds the following modules to the Self-Service application menu:

- **Self-Service > My Requests:** Create and view your requests.
- **Self-Service > HR Catalog:** Submit HR requests using individual catalog items.

Note: *If upgrading to Eureka, the HR catalog is not provided. HR Catalog entries are retained within the* ***Service Catalog > Human Resources*** *category used for Dublin.*

Activating HR Service Management

Human resources service management is available as a separate subscription that uses the Human Resources Service Automation: Core and the Human Resources Service Automation: Employee Change plugins. Activating the Employee Change plugin automatically activates the Core plugin.

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 activating it within the instance.

Click the plus to expand instructions for activating a plugin.

If you have the admin role, use the following steps to activate the plugin.

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

   If the plugin depends on other plugins, these plugins are listed along with their activation status.
3. [Optional] If available, select the **Load demo data** check box.

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

Upgrading from Versions Prior to Dublin

HR Service Management replaces the earlier Human Resources Management application. Customers who are currently using the Human Resources Management application can continue to use it after upgrading. However, that application cannot be activated after upgrading to Dublin or later releases.

Customers can use both the Human Resources Management application and the HR Service Management application, if required. There is no current migration path from Human Resources Management to HR Service Management.

Overwriting Knowledge Category Customizations

Please be aware that activating either the Human Resources Service Management: Core or Human Resources Service Management: Employee Change plugins overwrites any customizations made to knowledge categories and HR types and categories, as described in KB0540545 [2].

This issue is fixed in Eureka Patch 4.

Enhancements

Fuji

- New configuration options allow you to define the case processing flow.
  - Starting with Fuji Patch 5, a new Human Resources option lets you disable state flows.
  - If you disable state flows, you use workflows to process cases or change the state manually.
  - This option is disabled if you are upgrading from Eureka and use workflows or have customized HR states.
- The new auto-assignment feature allows:
  - Tasks are dispatched automatically.
  - When scheduling is deactivated, auto-assignment uses skills and location to select agents.
  - Agents with the fewest tasks assigned are selected first.

- The HR case form now includes:
  - Suspend and Resume buttons for putting case tasks on hold and resuming work.
  - New States added.
  - A new Add Task button.
- The new Catalog and Templates feature adds a model to each catalog item.

Eureka

HR employee change. This feature allows:

- Users to submit onboarding, employee change, and offboarding requests.
- HR managers and non-HR staff to fulfill tasks based on requests.
- Administrators to design fulfillment processes for HR changes.

References

[1] https://docs.servicenow.com/bundle/jakarta-service-management-for-the-enterprise/page/product/human-resources/reference/r_HRLandingPage.html
[2] https://hi.service-now.com/kb_view.do?sysparm_article=KB0540545

Installed Components

Overview

Activating the Human Resources Service Management: Core plugin adds or modifies tables, user roles, script includes, and other components.

Demo data is available with Human resources core.

Tables

Human Resources Service Management: Core adds or modifies the following tables:

Display Name [Table Name]	Description
HR Case [hr_case]	The details of an HR case that has been raised.
HR Task [hr_task]	The details of a task associated with a particular HR case.
HR Assignment Data Lookup [dl_hr_assignment]	The details of who HR cases can be assigned to.
HR Profile [hr_profile]	The details of a profile for an employee that contains sensitive information.
Emergency Contacts [hr_emergency_contact]	The details of emergency contacts, displayed in the hr_profile record for a sys_user. Contains a reference to Profile [hr_profile].
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].
Positions [hr_position]	The job positions and a reference to the departments the positions are part of.
Sf HR Task [sf_hr_task]	State flows controlling the HR task state transitions
Sf HR Case [sf_hr_case]	State flows controlling the HR case state transitions
CMDB HR Case Product Model [cmdb_hr_case_product_model]	Templates for common and catalog HR cases

CMDB HR Task Product Model [cmdb_hr_task_product_model]	Templates for common HR tasks

Plugins

Human Resources Service Management: Core activates the following additional plugins:

Plugin Name	Plugin ID	Description
Data Lookup and Record Matching Support	com.glide.data_lookup	Enables administrators to define rules that automatically set one or more field values when certain conditions are met. Used with the assignment lookup rules in human resources.
Country Lookup Data	com.glide.country	Provides a list of countries, used for HR organization data.

The following additional plugins can optionally be installed to provide additional functionality.

Plugin Name	Plugin ID	Description
Human Resources Service Management: Employee Change	com.snc.hr.employee_change	Provides change management for employees within HR.

User Roles

Human Resources Service Management: Core adds the following user roles. The new roles added in Fuji are:

- admin
- agent
- approver
- basic
- dispatcher
- preferred
- read.

Role	Description	Contains Roles
hr_admin	Administrates HR module, skills, territories, templates for HR.	• catalog_admin • hr_agent • hr_approver_user • hr_dispatcher • knowledge_manager • skill_admin • template_admin • territory_admin
hr_agent	Is assigned to, and completes HR tasks, can read cases.	• hr_basic
hr_approver_user	Can approve HR cases, when approval is turned on.	• approver_user
hr_assignment_reader	Can read assignment rules.	none
hr_assignment_writer	Can create, update, and delete assignment rules.	• hr_assignment_reader
hr_basic	General HR user - can read and write cases and tasks, assign tasks.	• document_management_user • hr_case_writer • inventory_user • skill_user • territory_user
hr_case_reader	Can read HR cases.	• hr_read

hr_case_writer	Can create and update HR cases, and edit the **Attached Knowledge** related list within HR cases.	• hr_case_reader
hr_dispatcher	Updates and assigns HR cases and tasks to agents.	• hr_basic • inventory_user • skill_model_user • territory_user
hr_initiator	Can create and update cases and tasks.	• hr_basic
hr_is_admin	Can read and write HR assignment rules.	• hr_assignment_reader • hr_assignment_writer
hr_kb_writer	Can create and update HR knowledge articles.	none
hr_manager	Can create and update HR cases, HR changes, HR tasks, HR knowledge articles, and HR profiles.	• hr_agent*hr_profile_writer • hr_case_reader • hr_case_writer • hr_dispatcher • hr_kb_writer • hr_position_writer • hr_profile_reader • hr_task_reader • hr_task_writer
hr_position_writer	Can create, update, and delete hr_position records.	none
hr_profile_reader	Can read HR profiles.	none
hr_profile_writer	Can create and update HR profiles.	• hr_profile_reader
hr_read	Can view all HR cases and tasks, read-only.	none
hr_task_reader	Can read HR tasks.	none
hr_task_writer	Can create and update HR tasks.	• hr_task_reader

UI Policies

Human Resources Service Management: Core adds the following UI policies.

UI Policy	Table
Lock fields when Task is closed	HR Task [hr_task]
Show Offboarding type when offboarding or previous employee	HR Profile [hr_profile]

Script Includes

Human Resources Service Management: Core adds the following script includes.

Name	Description	Extends
hr_AbstractWrapper	Abstract wrapper used to wrap GlideRecord objects related to the HR application.	
hr_AbstractSecurityManager	Abstract security manager providing default denied access. All security managers extend this class.	hr_AbstractWrapper
hr_BaseFactory	Base class providing wrappers for HR objects.	
hr	Container for commonly used values.	
hr_Factory	Customizable class providing the correct HR wrapper type.	
hr_AssignmentRulesSecurityManager	Wrapper for Assigned Rules security.	hr_AbstractSecurityManager
hr_Case	Wrapper class for HR Case records.	hr_AbstractWrapper
hr_CaseAjax	Wrapper class for HR Case Ajax requests.	AbstractAjaxProcessor
hr_CaseSecurityManager	Wrapper class for HR Case security.	hr_AbstractSecurityManager
hr_Task	Wrapper class for HR Task.	hr_AbstractWrapper
hr_TaskSecurityManager	Wrapper class for HR Task security.	hr_AbstractSecurityManager
hr_Profile	Wrapper class for HR Profile records.	hr_AbstractWrapper
hr_ProfileSecurityManager	Wrapper class for HR Profile security.	hr_AbstractSecurityManager
hr_SysUser	Wrapper class for HR functionality on sys_user records.	hr_AbstractWrapper
hr_EmergencyContactSecurityManager	Wrapper class for HR Profile Emergency Contact security.	hr_AbstractSecurityManager
hr_EmploymentHistorySecurityManager	Wrapper class for HR Profile Employment History security.	hr_AbstractSecurityManager
hr_KnowledgeSecurityManager	Wrapper class for HR Knowledge Base articles security.	hr_AbstractSecurityManager
hr_KnowledgeM2MSecurityManager	Wrapper class for Attached Knowledge related list security on hr_case form.	hr_AbstractSecurityManager
hr_Position	Wrapper class for HR Position records.	hr_AbstractWrapper
hr_PositionSecurityManager	Wrapper class for HR Position security.	hr_AbstractSecurityManager

Client Scripts

Human Resources Service Management: Core adds the following client scripts.

Script	Table	Description
Auto populate fields	HR Case [hr_case]	Automatically sets location and department fields in HR cases, based on details from the user associated with that record.
Custom Knowledge Search	HR Case [hr_case]	Custom Knowledge search for Human Resources in the HR case form view.
Hide Record Producer variables	HR Case [hr_case]	Hides record producer variables which would otherwise be displayed in the HR case form view.
End date must be after start date	HR Employment History [hr_employment_history]	Validates that the employment end date is not before the employment start date.
Start date must be before end date	HR Employment History [hr_employment_history]	Validates that the employment start date is not after the employment end date.

Business Rules

Human Resources Service Management: Core adds the following business rules.

Name	Table	When	Description
Accept	HR Task [hr_task]	before	If users assigned a task cannot reject it, move the state to Accepted.
Assigned	HR Case [hr_case]	before	If any task is assigned, and HR is request driven (the default), mark the case as assigned.
Assigned	HR Task [hr_task]	before	If ready for work, and the Assigned to value is set, mark the task as assigned
Cancel Cleanup	HR Task [hr_task]	after	When the task is cancelled, clear transfers and dependencies
Cancellation	HR Case [hr_case]	after	When the case is cancelled, cancel all tasks.
Ready for Approval	HR Case [hr_case]	after	When a new case is created, with a template, and approval is on, move to ready for approval and start the approval workflow.
Ready for Work	HR Task [hr_task]	before	A new task with a template and where the parent already has a task created should go to pending assignment.
Ready for Work (approval off)	HR Task [hr_task]	before	A new task, assigned to a user, or with a template when approval is not on should go to Ready.
Ready for Work (approval on)	HR Case [hr_case]	before	An approved case with a template or assigned to a user, when approvals are on should go to ready.
Reassign	HR Task [hr_task]	before	When a task is reassigned, if parts are in transit, reject the update.
Start Work	HR Task [hr_task]	before	When the work start date is set, if we are request driven and not assigned, set the assignment group and assigned to from the parent case.
Start Work	HR Case [hr_case]	before	When the work start date is set, move the status to work in progress.
Verify Work Notes	HR Case [hr_case]	before	When closing a case, check if work notes have been set, if not, set a work note.
Verify Work Notes	HR Task [hr_task]	before	When closing a case, check if work notes have been set, if not, set a work note.
Restrict query	HR Assignment Data Lookup [dl_hr_assignment]	before	Amends query used to get records to display in list view.
Update HR Case percent complete	Task [task]	after	Updates the Task percent complete value in hr_case records after insert, update, or delete.
Restrict query	HR Task [hr_task]	before	Amends the query used to get records to display in list view.
Update hr_case when hr_task changes	HR Task [hr_task]	after	Updates **Additional comments** and **Work notes** fields on the associated hr_case record when an hr_task record is created or updated.
Restrict query	HR Case [hr_case]	before	Amends the query used to get records to display in list view.
Clear durations	HR Case [hr_case]	before	Clears the **Duration** value on hr_case records if the case is reactivated (when Active changes to true on a record inserted or updated).
Update durations	HR Case [hr_case]	before	Sets the **Duration** value on hr_case records if the case becomes inactive (when Active changes to false on record inserted or updated).
Send hr_case events	HR Case [hr_case]	after	Adds events to the event queue when records are inserted or updated.
Set user fields	HR Case [hr_case]	before	Sets the **Opened for** value on an hr_case record when the record is inserted or updated.
Synchronize fields to hr_profile	User [sys_user]	before	Synchronizes fields between associated hr_profile and sys_user records on update of the sys_user record.

Synchronize fields to sys_user	HR Profile [hr_profile]	before	Synchronizes fields between associated sys_user and hr_profile records on update of the hr_profile record.
Update name field	HR Profile [hr_profile]	before	Updates the **Name** value on an hr_profile record if the **First name** or **Last name** value changes when a record is inserted or updated.
Validate end date is after start date	HR Profile [hr_profile]	before	Validates that **Employment end date** is after **Employment start date** if any of the two values changes when an hr_profile record is inserted or updated.
Restrict query	HR Profile [hr_profile]	before	Amends the query used to get records to display in list view.
Restrict query	Emergency Contact [hr_emergency_contact]	before	Amends the query used to get records to display in list view.
Restrict query	Employment History [hr_employment_history]	before	Amends the query used to get records to display in list view.
Restrict query	Position [hr_position]	before	Amends the query used to get records to display in list view.

Email Notifications

Human Resources Service Management: Core adds the following email notifications.

Name	Table	Condition	Recipients
HR Case opened	HR Case [hr_case]	Active is true on record inserted	opened_by, opened_for
HR Case assigned to me	HR Case [hr_case]	Active is true AND Assigned to is not empty AND Assigned to change AND On record inserted or updated	assigned_to
HR Task assigned to me	HR Task [hr_task]	Active is true AND Assigned to is not empty AND Assigned to change AND On record inserted or updated	assigned_to
HR Case assigned to my group	HR Case [hr_case]	Active is true AND Assigned to is empty AND Assignment group changes AND Assignment group is not empty AND On record inserted or updated	assignment_group
HR Task assigned to my group	HR Task [hr_task]	Active is true AND Assigned to is empty AND Assignment group changes AND Assignment group is not empty AND On record inserted or updated	assignment_group
HR Case commented	HR Case [hr_case]	Active is true AND Additional Comments changes AND On record updated	assigned_to, opened_by, opened_for, watch_list
HR Task commented	HR Case [hr_case]	Active is true AND Additional Comments changes AND On record updated	assigned_to, watch_list
HR Case worknoted	HR Case [hr_case]	Active is true AND Assigned to is not empty AND Work notes changes AND On record updated	assigned_to
HR Case closed	HR Case [hr_case]	Active is false AND On record updated	assigned_to, opened_by, opened_for, watch_list

Using the HR catalog

Note: *This article applies to Fuji and earlier releases. For more current information, see HR Catalog* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.'**

Overview

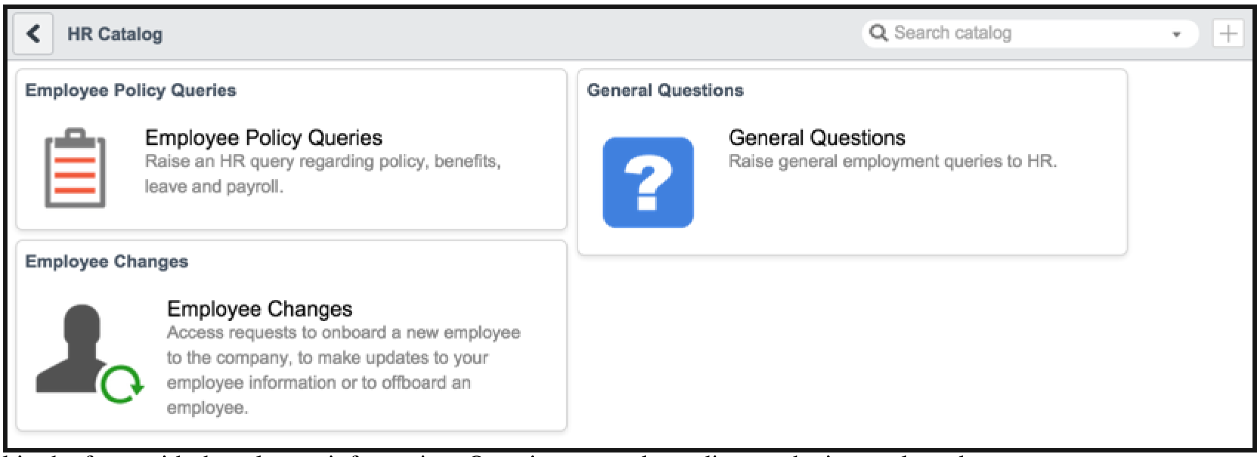
As an end user, you can use the service catalog to submit requests to HR for a variety of reasons. For example, you can submit a request to ask about the organization's maternity leave policy.

You can also view HR requests to track the progress of your cases.

Submitting a Case to HR

The HR catalog allows you to submit HR cases.

1. Navigate to **Self-Service > HR Catalog**.
2. Select the appropriate category and item.

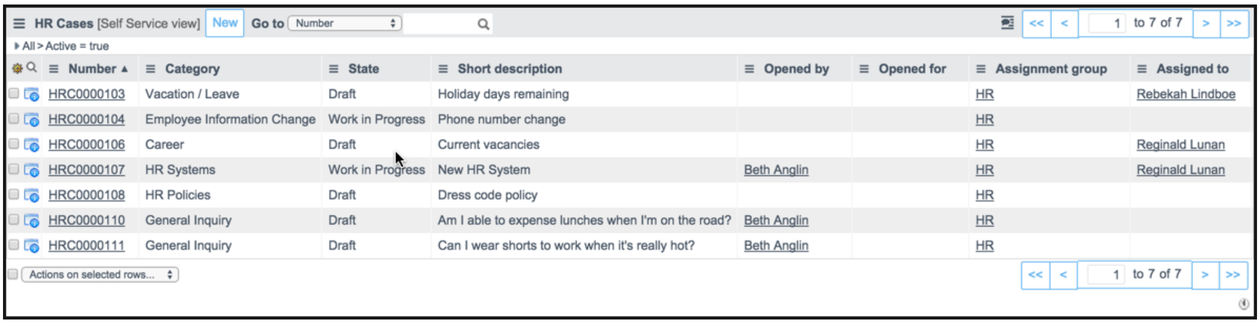


3. Fill in the form with the relevant information. Questions vary depending on the item selected.
4. Click **Submit**.

   The case is submitted to HR for processing.

Viewing Submitted Cases

Navigate to **Self-Service > My Requests** to view a list of active HR cases you have submitted as requests.



HR Cases [Self Service view] New Go to Number 1 to 7 of 7

All > Active = true

Number ▲	Category	State	Short description	Opened by	Opened for	Assignment group	Assigned to
HRC0000103	Vacation / Leave	Draft	Holiday days remaining			HR	Rebekah Lindboe
HRC0000104	Employee Information Change	Work in Progress	Phone number change			HR	
HRC0000106	Career	Draft	Current vacancies			HR	Reginald Lunan
HRC0000107	HR Systems	Work in Progress	New HR System	Beth Anglin		HR	Reginald Lunan
HRC0000108	HR Policies	Draft	Dress code policy			HR	
HRC0000110	General Inquiry	Draft	Am I able to expense lunches when I'm on the road?	Beth Anglin		HR	
HRC0000111	General Inquiry	Draft	Can I wear shorts to work when it's really hot?	Beth Anglin		HR	

Actions on selected rows... 1 to 7 of 7

References

[1] https://docs.servicenow.com/bundle/jakarta-service-management-for-the-enterprise/page/product/human-resources/concept/c_HRCatalog.html

Administration

Overview

HR managers can:

- View the dashboard to review HR team progress.
- Run HR reports to track the progress of HR cases.
- Define assignment rules to automatically assign cases.
- Define organization positions to describe employee job roles.

Viewing the Dashboard

The human resources dashboard is a homepage that contains gauges and reports showing HR case information for:

- Active HR cases by category.
- Active HR cases by assignment.
- Active HR case breakdown.
- HR Cases Opened in the Last 6 Months by Category.

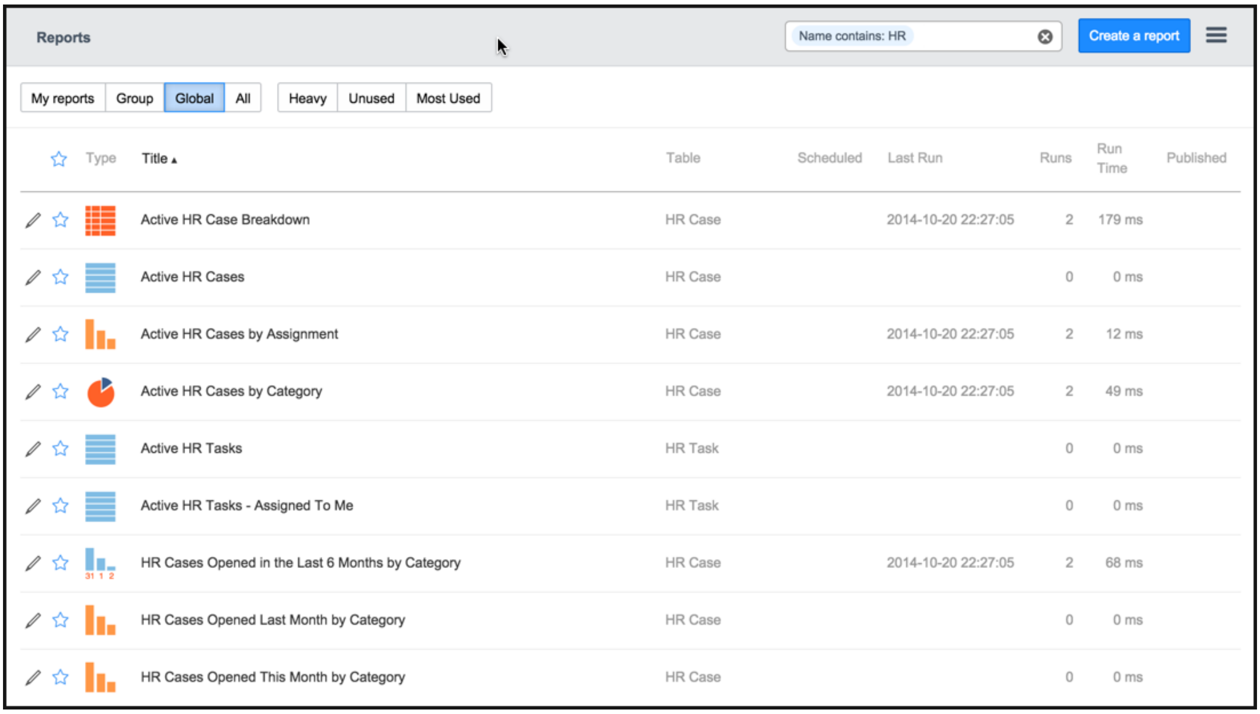
Navigate to **Human Resources > Overview** to view the dashboard.

See Available Reports for details of these reports.

Running HR Reports

Administrators and users with the hr_manager role can run reports to view the current status of HR cases, track them, and intervene where required, to improve overall efficiency and effectiveness. For example, you can view HR cases in the Employee Relations category that have been created in the past month.

To run a report, navigate to **Human Resources > Reports**.



Select the report entry to run the report.

Available Reports

These reports are available by default:

Report name	Description	Displays
Active HR Case Breakdown	Count of the different types of cases raised and the users who raised them.	Assigned to, HR Case type
Active HR Cases	Tabular view of all active cases.	Number, Type, Category, State, Short description, Opened by, Assignment group, Assigned to
Active HR Cases by Assignment	Bar chart showing the number of cases assigned to each HR user.	Assigned to, Count
Active HR Cases by Category	Pie chart where each slice represents an HR case category.	Category, Count
HR Cases Opened in the Last 6 Months by Category	Trend chart where each bar represents an HR case category in which cases were raised over the last 6 months.	Category, Count
HR Cases Opened Last Month by Category	Bar chart of cases raised over the last month by HR case category.	Category, Count, Month
HR Cases Opened This Month by Category	Bar chart of cases raised over the current month by HR case category.	Category, Count
Unassigned HR Cases	List of HR cases not assigned to any user.	Number, Type, Category, State, Short description, Opened by, Assignment group, Assigned to
Active HR Tasks	List of active HR tasks.	Number, State, Short description, Opened by, Assignment group, Assigned to

Active HR Tasks - Assigned To Me	List of HR tasks assigned to the current user.	Number, Case, Short description, State, Assignment group, Assigned to

If you are using HR employee change, you also see the following reports:

Report name	Description	Displays
Onboarding calendar	Calendar report showing all active onboarding requests in a calendar view, sorted by employee change date.	Number, Category, State, Short description, Opened by, Opened for, Assignment group, Assigned to
Onboarding cases starting next week less than 100% complete	Outstanding onboarding cases requiring attention, based on HR changes with change dates in the upcoming week.	Number, Category, State, Short description, Opened by, Opened for, Assignment group, Assigned to

Using Assignment Rules

HR managers, users with the hris_admin role, can define data lookup rules to automatically assign cases to specific users or groups based on the rule conditions. This allows new or modified HR cases to be quickly assigned for processing.

HR managers can define assignment rules to assign cases to groups and turn on auto-assignment to create a group-based assignment engine. The assignment rules set the correct group, and then auto-assignment picks the best person in the group. This results in some load balancing being done. Using assignment rules alone works best when only one person performs the particular type of case or task. Using auto-assignment alone is better when a group of people can perform the particular type of case or task.

For example, an assignment rule could specify that all cases raised by a user in Germany should be automatically assigned to the German HR representative. The German representative can then view this information by navigating to **Human Resources > Service Management > Assigned to me**.

Assignment lookup rules contain:

- **Lookup fields**: matcher information, defining one or more conditions to match against.
- **Assignment fields**: setter information, defining the user or group to assign the case to, if a valid matcher condition is met.

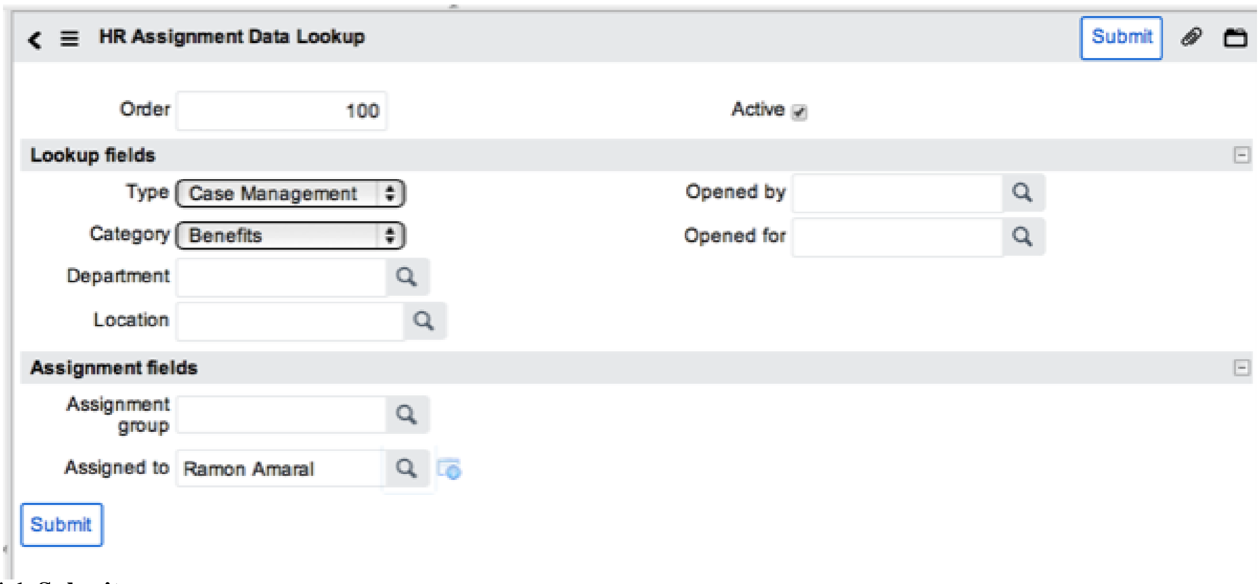
Note: *If you choose not to use the data lookup or assignment rules described in this section, you can use auto-assignment for tasks, requests, or both. To do so, you must use the assignment group specified in the template.*

Creating an Assignment Rule

To define an assignment lookup rule for human resources:

1. Navigate to **Human Resources > Administration > Assignment Lookup Rules**.
2. Click **New**.
3. Fill in the fields (see table).

   This example rule defines that all cases with a category of **Benefits** are to be assigned to Ramon Amaral.



4. Click **Submit**.

Field	Description
Order	Determines the priority order of this rule. The rules run from lowest to highest order, and the first rule that matches the lookup fields determines the case assignment values.
Active	Defines whether the rule is active.
Lookup fields	
Type	Matches the type of record to evaluate. For the Dublin release, select **Service Management**.
Category	Matches the case category.
Opened by	Matches the user who opened the case.
Opened for	Matches the user the case was opened for.
Department	Matches the department of the case.
Location	Matches the location of the case,
Assignment fields	
Assignment group	Assigns cases that match the lookup fields to this group. **Note:** Assignment groups are restricted to those groups with a type of **human_resources**. You may need to configure the Group form to add the **Type** field.
Assigned to	Assigns cases that match the lookup fields to this user.

Testing Assignment Rules

To verify that an assignment rule works as intended:

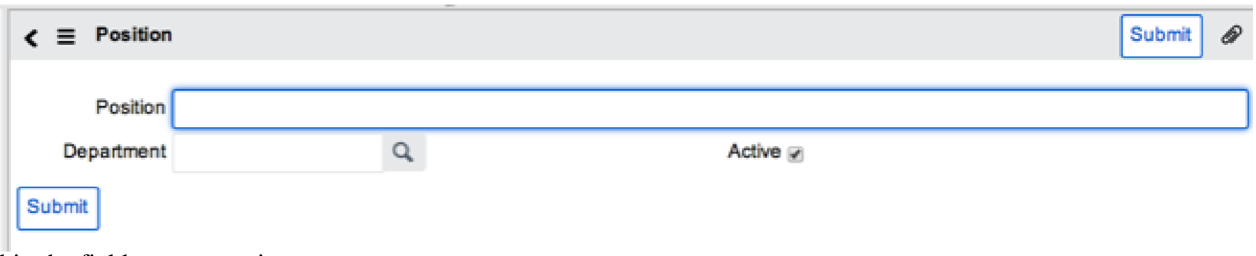
1. Create a new HR case.
2. Populate the form with data matching the matcher conditions.
3. Save the HR case.
4. Reopen the case and check that the correct assignment information has been added.

Defining Organization Positions

As part of the setup process for HR Service Management, HR managers should define organization positions to describe employee job roles within the organization.

Note: *Other organization information such as location or department information is available in your current system. To use the HR Service Management application, you must create position records for your organization.*

1. Navigate to **Human Resources > Organizations > Positions** to see a list of defined positions.
2. Click **New** to create a position, or click an entry to view or edit details for that position.



3. Fill in the fields as appropriate.
4. Click **Submit**.

HR Cases

Managing Cases

Note: *This article applies to Fuji and earlier releases. For more current information, see HR Case Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

Overview

HR cases hold the details of HR requests such as requests for information and disciplinary procedures.

HR managers, users with the hr_manager role, can:

- Create HR cases to record the processing of individual HR requests. For example, create an HR case to record the advice provided to an employee regarding an issue.
- View HR case information and manage the overall HR workload. For example, list all HR cases that have not been assigned.

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

HR Case Example

Allan has been working with your organization for several months. Allan's wife is expecting a baby, so Allan wants to know about your organization's paternity leave policy, and also wants to discuss with his line manager the possibility of working flexible hours around the expected time of the birth.

1. Allan submits an HR request asking about paternity leave policies and requesting a meeting to discuss flexible working hours. This creates an HR case.
2. A member of the HR department then processes the HR case, creating two separate HR tasks for this two-part request.
3. Each task in the HR case is assigned to the user who can process the task.
4. When all the tasks are completed, the HR case can be marked as **Closed Complete**.

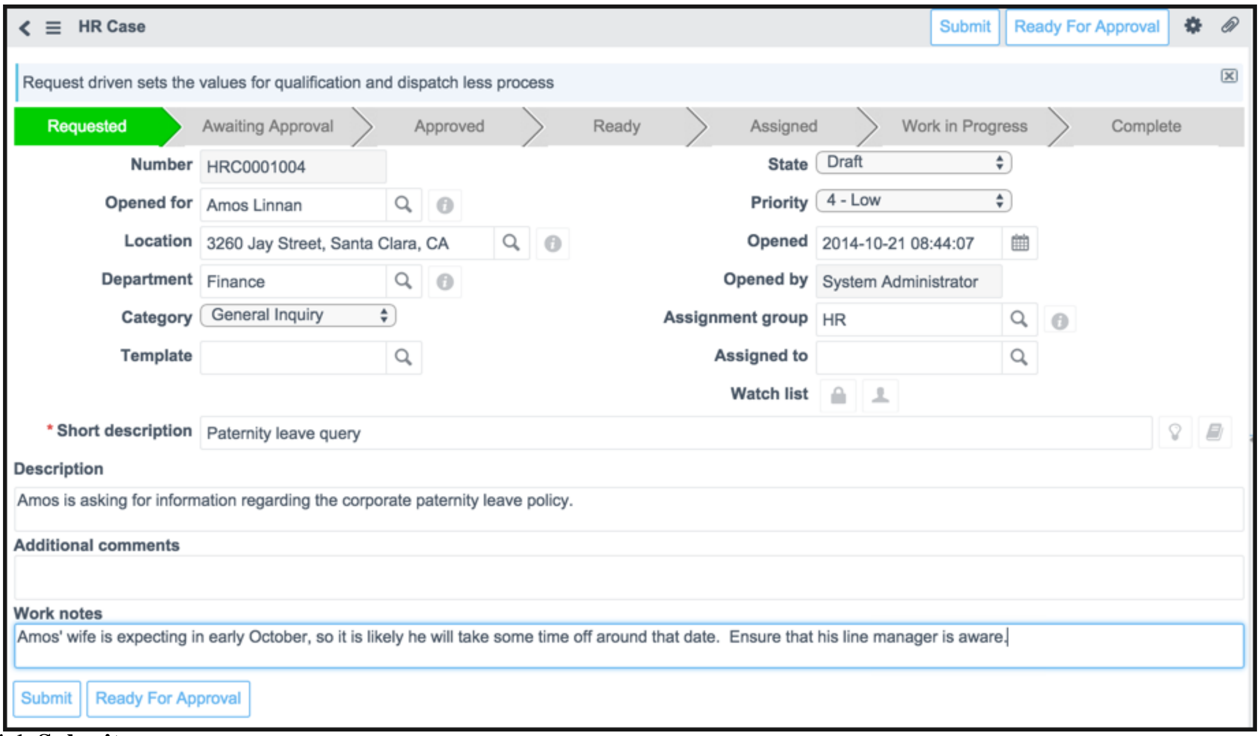
Creating HR Cases

All end users can use Self-Service to create HR cases for themselves:

- By submitting a request through the service catalog.
- By adding a request through the My HR Requests module.

Users with the hr_manager or hr_case_writer role can also create HR cases for other users. Templates can be used to create standard tasks for each type of case.

1. Navigate to **Human Resources > Case Management > Create New**.
2. Fill in the fields (see table).



3. Click **Submit**.

Note: *The workflow steps that appear across the top of the screen are based on your selections on the Human Resources Configuration.*

Field	Description
Number	The ID number for the case.
Opened for	The user the case relates to. Set to the currently-logged in user by default. If a different user is selected, that user's **location** and **department** information is populated into the case.
Location	The geographical location of the user associated with the case.
Department	The department of the user associated with the case.
Category	The category of the HR case. Available options include: **Benefits**, **Career**, **Employee Information Change**, **Employee Relations**, **General Inquiry**, **HR Systems**, **HR Policies**, **Payroll**, or **Vacation / Leave**. For more information, see HR Case Categories. **Note:** Cases with the **Employee Relations** category have an associated example workflow.
Template	The template for creating this case. Click the lookup icon and select a template. The description of the selected template populates the **Description** field. If you select **Tasks will be dispatched manually** in the Human Resources Configuration, human resources tasks for cases that use templates are automatically transitioned to **Pending dispatch**. For more information on templates, see Creating Service Order Templates.
State	The state of the case. Values can be **Ready**, **Draft**, **Work in Progress**, **Assigned**, **Closed Complete**, **Closed Incomplete**, **Cancelled**. **Note:** The **Draft** state appears only for cases created using the **New** button on the HR Case form.
Priority	The precedence of the case. This value is based on severity of the impact, number of users affected, or other factors. The SLA applied to this case is determined by the priority selected in this field.
Opened	The date and time the case opened.
Opened by	The user who created the record.

Assignment group

The group the record is assigned to. This may be set automatically, depending on the assignment rules defined. **Notes:**

- Assignment groups are restricted to those groups with a type of **human_resources**. You may need to configure the group form to add the **Type** field.
- If you select the **Human Resources will use the dispatch queue** option in [Human Resources_Service_Management_ConfigurationHuman Resources Service Management Configuration, only users with the Dispatcher role can edit this field. If you select the **Human Resources will not use the dispatch queue** option, all users except those with the Basic and Initiator roles can edit this field.

Assigned to

Legal Service Management Configuration]], only users with the Dispatcher and Agent roles can edit this field. If you select the **Human Resources will not use the dispatch queue** option, all users except those with the Basic and Initiator roles can edit this field.

- If you select an assignment group and want to assign the work to a new user, click the lookup icon next to **Assigned to**, click **New**, and create a new user. Be aware, however, that you must navigate to **User Administration > Groups** and add the user to the assignment group before the request can be assigned.

Watch list

The list of users who receive notifications regarding this case.

Short description

A brief description of the case.

Description

A longer, more detailed description of the case.

Additional comments

Any comments appropriate for the associated user to view. The user can see the Additional comments field in the case record.

Work notes

Any ongoing internal work notes, filled in as the case progresses.

Note: *The **Type** field differentiates between HR types of work, such as HR cases and HR changes, and is coupled with the relevant table type. It is a hidden and read-only field, as it is not currently available to be used.*

HR Case Categories

Category	Description	Example
Benefits	Ask about the benefits employees have.	Do I get dental coverage if I work in the UK?
Career	Ask a question regarding employee careers.	What sort of career path can I expect if I join this company?
Employee Information Change	Ask about changes to employee details held by HR.	If my address has changed, who do I need to notify?
Employee Relations	Ask about relationships with other co-workers.	Are inter-departmental relationships allowed according to company policy?
General Inquiry	Ask a general question for which a specific record producer does not exist.	Does the company organize an end of year party for its employees?
HR Systems	Ask about the HR systems employees use.	How do I find out how many holidays I have left for this year?
HR Policies	Ask about the policies of the HR department.	What is the current policy for a couple to work in the same department?
Payroll	Ask a question about payroll or salary.	On what day of the month does my account get credited?
Vacation / Leave	Ask about taking time off.	How can I book compassionate leave?

Approving Cases

HR case management requests may require review and approval before the HR case process can proceed. Approvals can be assigned to individual users or members of a specified group. For example, the predefined HR case processes define as approvers all users belonging to the HR group. The first approval response to the request is always taken to approve or reject the request.

Note: *The case approval process is active only if you select the* ***Approval is required for new requests*** *option in the Human Resources Configuration.*

If an approval is required, the following process must be carried out:

1. The workflow sends an email notification to all approvers to advise them that an approval is awaiting their attention.
2. One of the approvers must then open the HR case record by either:
   - Clicking on the link provided in the email.
   - Navigating to **Human Resources > My Approvals**, then selecting the appropriate record.
3. The approver clicks **Approve** or **Reject**, which updates the record state accordingly.

   The approval is processed.

   - If the request is approved, the process continues and the HR case record state moves to **Work in Progress**.
   - If the request is rejected, the process terminates, the HR case record state moves to **Closed Incomplete**.

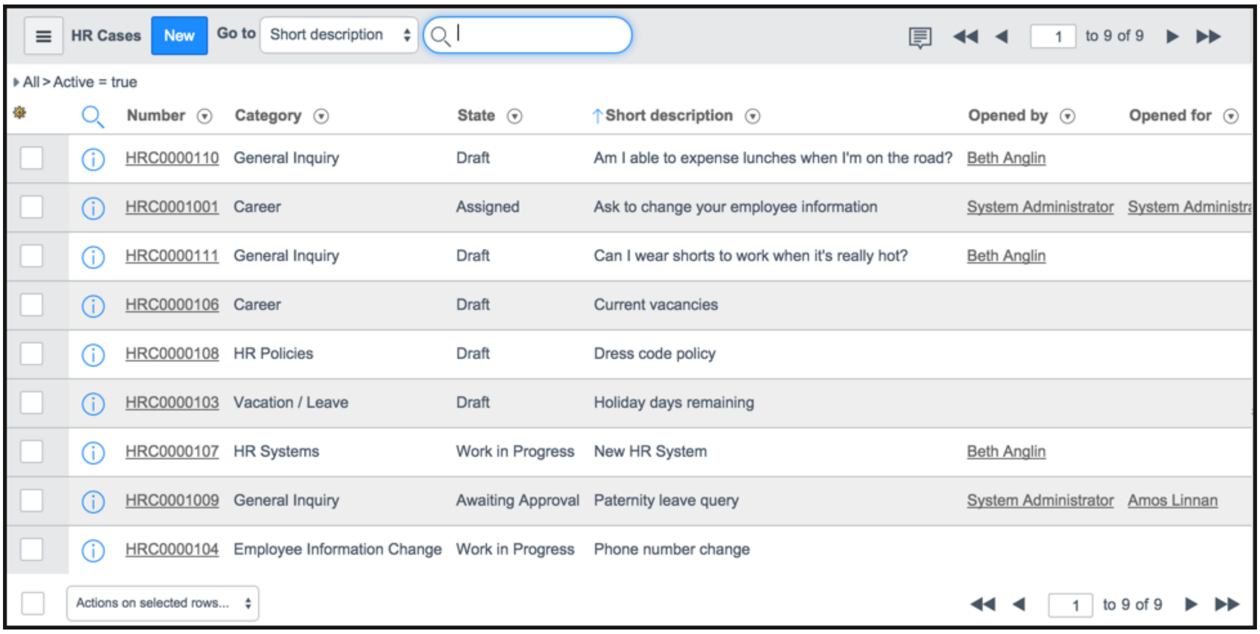
Approvers for a change are shown in the **Approvers** related list for that HR case record.

Viewing Case Information

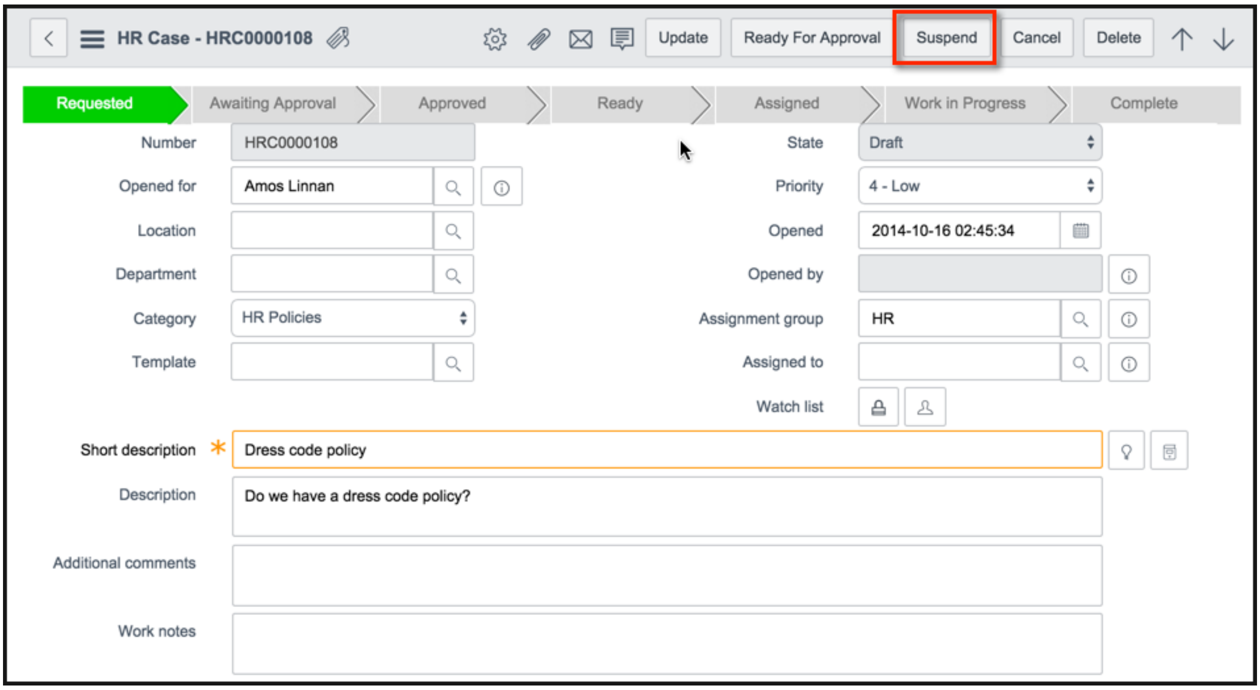
Navigate to **Human Resources > Case Management**, then select one of these modules:

- **Assigned to me:** all cases assigned to the logged-in user.
- **Open:** all open cases.
- **Open - Unassigned:** all open cases that have not been assigned.
- **All:** all cases.
- **Closed:** all closed cases.

For example, if you choose **Open**:



Note: *When you open a case, it contains a* ***Suspend*** *button. You can click this to put the case on hold. When you are ready to remove the hold, click* ***Resume****.*



References

[1] https://docs.servicenow.com/bundle/jakarta-service-management-for-the-enterprise/page/product/human-resources/concept/c_HRCaseManagement.html

Using HR Tasks

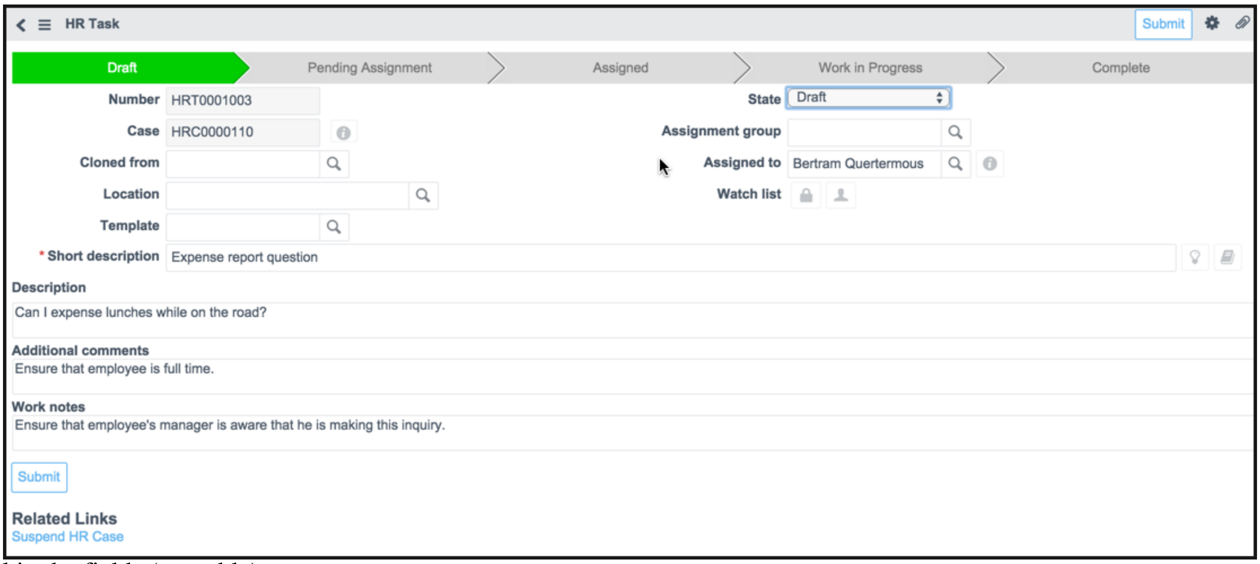
Overview

HR managers can process HR cases in a structured way by dividing the work required for cases into separate HR tasks.

HR cases created from the Service Catalog or with a template can have a default set of tasks defined in the template. Using a template is the easiest way to define a set of tasks that are commonly used for one type of HR case.

Creating HR Tasks

1. Navigate to **Human Resources > Case Management > All**.
2. Open an HR case.
3. Click the **Add Task** related link.



4. Fill in the fields (see table).
5. Click **Submit**.

Field	Description
Number	The auto-generated ID number for this HR task.
State	The state of the task. Available options include: **New**, **Work in Progress**, and **Closed**.
Case	The auto-populated parent case record for this task.
Assignment group	The assignment group for the task.
Assigned to	The user assigned to fulfill the task.
Template	Select a template to populate fields and create tasks.
Short description	A brief description of the task.
Description	A longer, more detailed description of the task.
Additional comments	Any comments appropriate for the associated user to view. The user can see these comments in the **Activity** section of the parent case record.
Work notes	Any ongoing internal work notes, filled in as the task progresses.

Viewing HR Tasks

Navigate to **Human Resources > HR Tasks**, then select one of these modules:

- **Assigned to me:** all HR tasks assigned to you.
- **Open:** all open HR tasks.
- **Open - Unassigned:** all open HR tasks that have not been assigned.
- **All:** all HR tasks.
- **Closed:** all closed HR tasks.

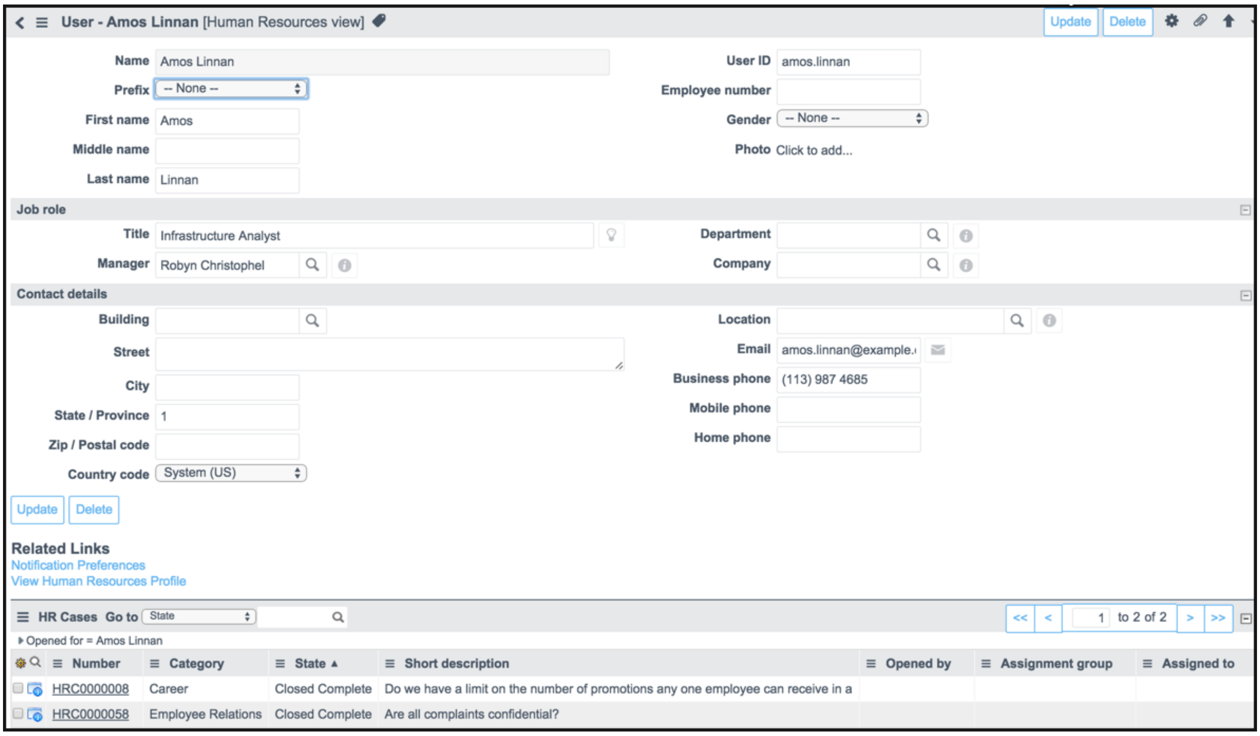
Organization information

Overview

HR managers can quickly access information giving details of the user and other organizational information associated with HR cases.

Viewing the User Directory

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



This view is a subset of the user information, with fields to define information such as the employee's prefix, middle name, employee number, and additional location and contact information.

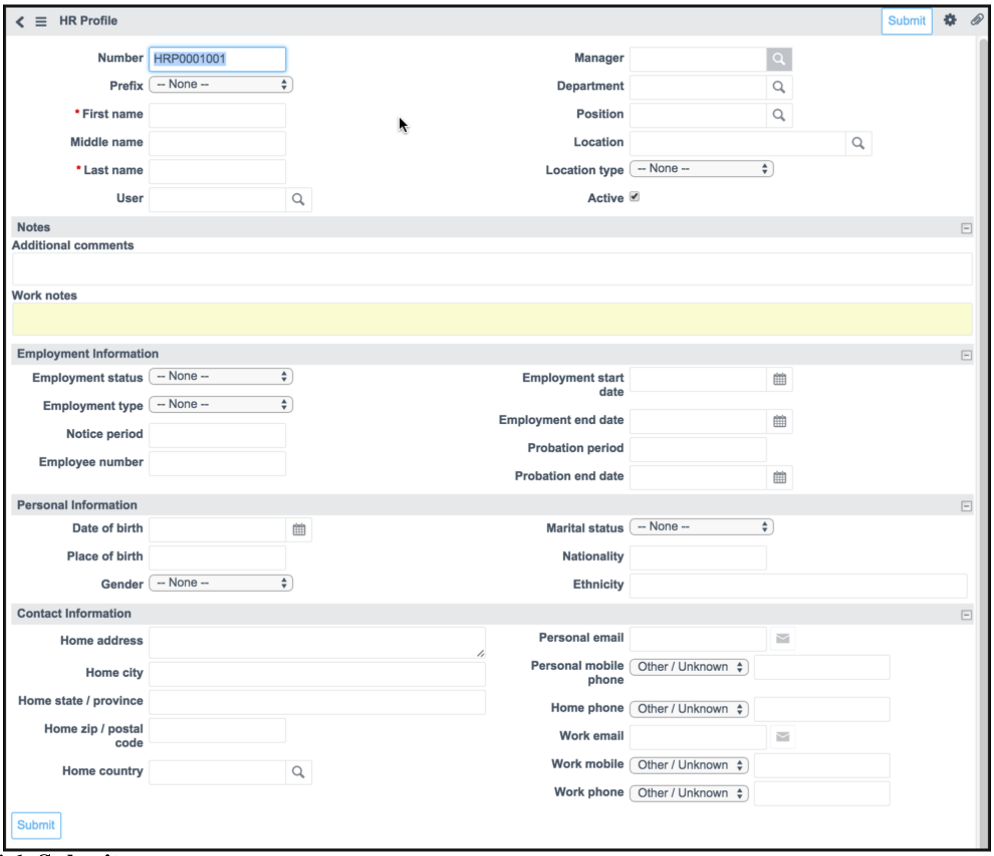
In addition, there are two extra related lists:

- **HR Cases:** shows any HR cases opened for that user.
- **Users:** shows any users managed by that user.

Viewing the User Profile

HR profile information shows confidential information about a user in ServiceNow. Users with the hr_profile_reader or hr_profile_writer roles can view this information and users with the hr_profile_writer role can edit this information.

1. Navigate to **Human Resources > Organization > User Profile** to display a list of created profiles.
2. Click on the user, or select **New** to create a new profile for a user.
3. Fill in the details.



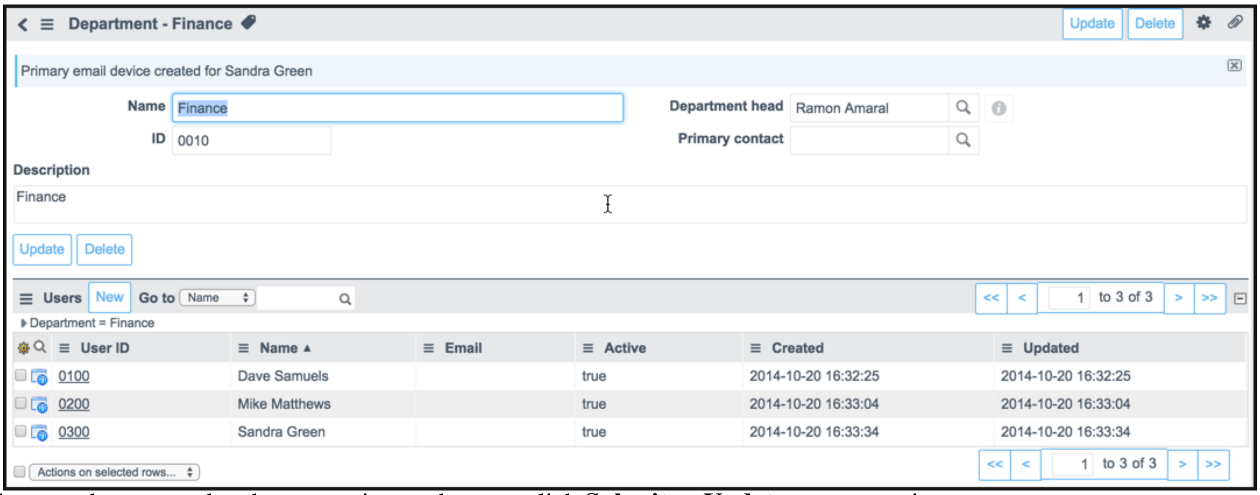
4. Click **Submit**.

Note: *Some HR profile information, such as department, is synchronized between user [sys_user] and profile [hr_profile] records. Updates to this information in one record are automatically applied to the equivalent fields in the other record, assuming that the updater has appropriate write permissions to that record. See Synchronizing Profile and User Information for more details.*

Viewing Departments

Departments in an organization allow employees to be assigned to relevant business functions.

1. Navigate to **Human Resources > Organization > Departments** for a list of departments.
2. Click an entry to view or edit details for a department.

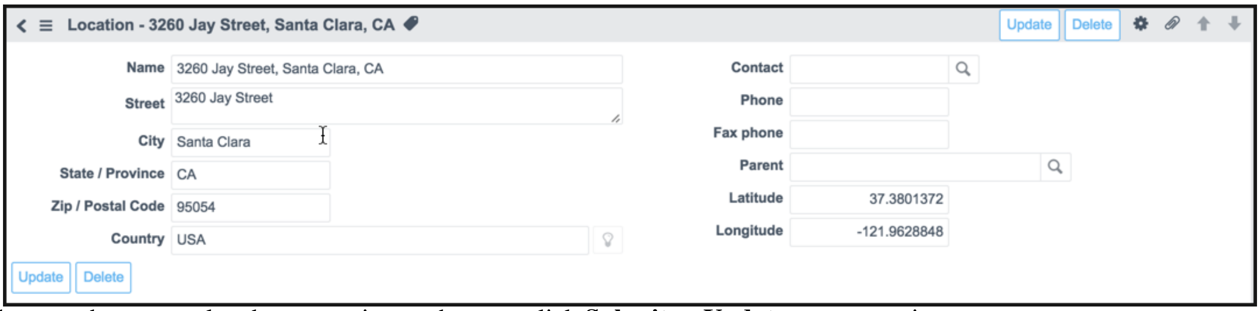


3. When you have completed your entries or changes, click **Submit** or **Update**, as appropriate.

Viewing Locations

Location records store the address and contact details for each site in your organization.

1. Navigate to **Human Resources > Organizations > Locations** for a list of locations.
2. Click an entry to view or edit details for a location.



3. When you have completed your entries or changes, click **Submit** or **Update**, as appropriate.

Managing Knowledge

Note: *This article applies to Fuji and earlier releases. For more current information, see Knowledge Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

Overview

Users with the hr_kb_writer role can create and maintain articles in their ServiceNow knowledge base if the is **Human Resources**.

Employees can then access these HR knowledge articles from the knowledge portal to help resolve HR cases, and provide HR information for topics such as company policies and other corporate information.

Creating and Editing Knowledge Articles

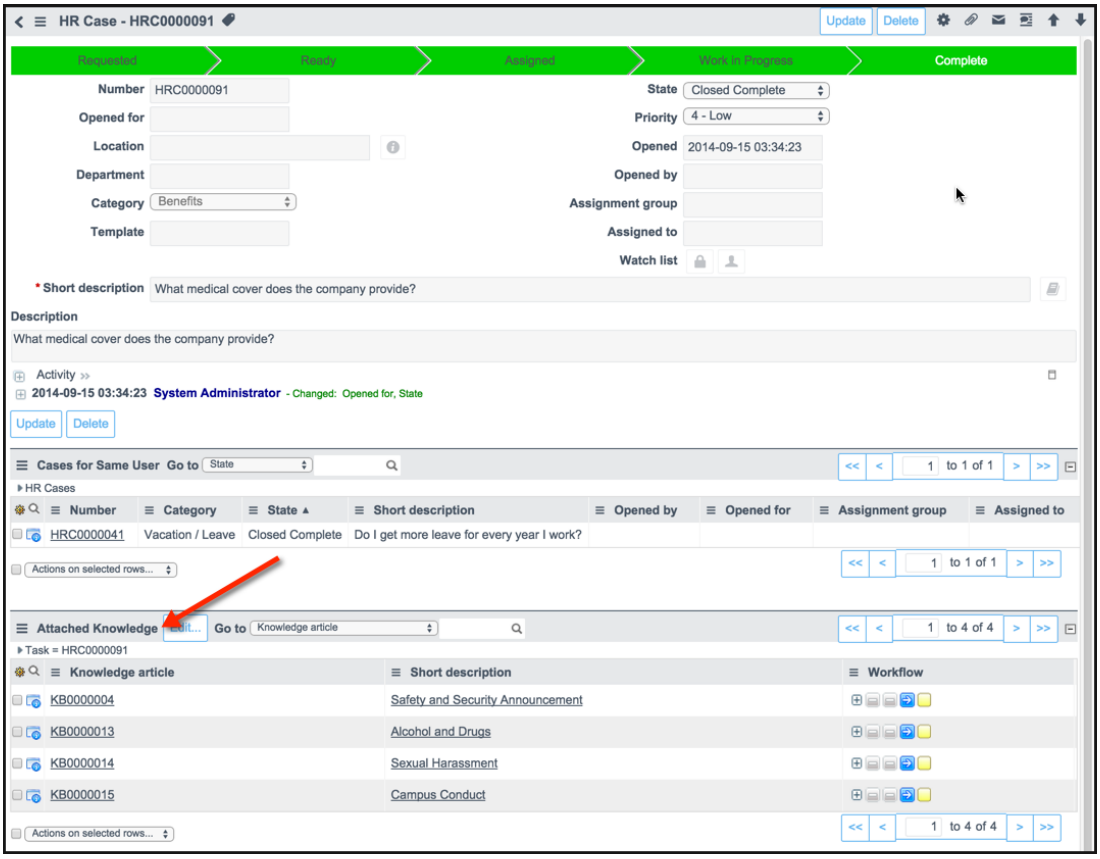
To create or edit an article, navigate to one of the modules under **Human Resources > Knowledge**.

Module	Description
Create New	Opens the Knowledge form where you can create a new article with a topic of **Human Resources**. The article number is provided. Enter the content for the article. Users with the hr_kb_writer role can set the article workflow state and assign roles to limit access.
Published	Lists the HR knowledge articles whose workflow state is **Published**. These articles are accessible from the knowledge portal and search. Review or update published articles, as needed.
Edit	Lists all HR knowledge articles, regardless of their workflow state. Review or update the articles, as needed.
Retired	Lists HR knowledge articles whose workflow state is **Retired**. These articles are not accessible from the knowledge portal or search. Review the articles to determine whether any should be updated and republished, retained for historical reference, or deleted.

Adding Knowledge Articles to HR Cases

Adding a knowledge article to a record can be useful to help process that record. For example, for a disciplinary record, attaching a relevant knowledge article regarding specific disciplinary information may be useful.

In an HR case record, select the **Attached Knowledge** related list to add or view knowledge articles related to that record.



Select **Edit** to add an article, or click on the article entry to view the details.

References

[1] https://docs.servicenow.com/bundle/jakarta-service-management-for-the-enterprise/page/product/human-resources/concept/c_HRKnowledgeIst.html

HR Employee Change

Overview

Overview

HR employee change allows human resources (HR) staff to manage and track changes such an employee offboarding, and allows employees to update their own profile records with information such as a new home address.

HR employee change includes:

- Areas to store HR change information securely to ensure confidentiality of these records and a standard mechanism to allow controlled changes to this data.
- Options to customize HR change processes for your own organization.
- Detailed predefined HR processes for onboarding, information change, and offboarding.

HR employee change is an extension to HR service management, and requires the Human Resources Service Management: Employee Change plugin.

HR employee change is available starting with the Eureka release.

Benefits of HR Employee Change

HR employee change allows you to automate processes, such as this onboarding example, and integrate these processes with the wider organization. This allows HR teams to increase process efficiency and improve collaboration with other departments.

HR department members can identify standard sets of tasks they must conduct for these processes, then HR employee change can automatically create and assign these tasks at the appropriate time.

HR employee change can pass employee information to other departments automatically and start their processes. The HR team does not need any real awareness of the specifics of these other processes. This allows departments such as IT or Facilities to retain control over their own processes, and simply inform the HR department when these processes are completed.

HR Change Processes

HR employee change provides these processes, launched as requests from the HR catalog:

- **Employee onboarding:** Allows HR managers to submit an HR onboarding request for a new employee.
- **Employee information change:** Allows employees to submit HR requests to update their own HR profile information, such as for an address change. Employees can use this to keep their personal HR profile information up-to-date. HR managers can also use this process to track information changes, or they can edit HR profile records directly.
- **Employee offboarding:** Allows HR managers to submit an HR offboarding request for an employee.

These processes all generate HR change records and launch automated workflows.

Example Process: Onboarding

Allan is a new employee, who has been recruited to join your organization as a developer.

1. Allan's HR manager submits an **Employee Onboarding** HR request.

    This creates a new HR change record, a type of HR case record, with the category **Onboarding**. It also creates a new HR profile record to hold Allan's personal information.
2. An approval workflow starts to verify and approve the request.
3. After approval, standard HR tasks are automatically created for the HR team to fulfill, such as setting up payroll, making background checks, and collecting references.
4. The HR team can add information to Allan’s HR profile to store and track all the data he provides to them.
5. Allan’s user record is automatically created and linked to his HR profile.
6. A workflow automatically generates requests to provide Allan with the correct IT hardware, software, and systems access based on his department, location, and position.
7. The HR team can view the HR change and track the progress of the onboarding process.
8. When all the appropriate tasks are complete, the HR department can view the change record and confirm that everything is ready for Allan’s first day.

Installed Components

Overview

Activating the Human Resources Service Management: Employee Change plugin adds or modifies tables, user roles, script includes, and other components.

Demo data is available with Human Resources Employee Change.

Tables

Human Resources Service Management: Employee Change adds or modifies the following tables.

Display Name [Table Name]	Description
HR Employee Change [hr_change]	The details of an HR change that has been raised. The hr_change table extends the hr_case table.

Plugins

Human Resources Service Management: Employee Change activates the following additional plugins.

Plugin Name	Plugin ID	Description
Human Resources Service Management: Core	com.snc.hr.core	Provides the core functionality for the HR service management system.

Script Includes

Human Resources Service Management: Employee Change adds the following script includes.

Name	Description	Extends
hr_Change	Wrapper class for HR Employee Change records.	hr_AbstractWrapper

Business Rules

Human Resources Service Management: Employee Change adds the following business rules.

Name	Table	When	Description
Validate opened_for against hr_profile	HR Employee Change [hr_change]	before	Updates the **Opened for** value on hr_change records when **State** is not **Requested** and the record is updated.
Restrict query	HR Employee Change [hr_change]	before	Amends the query used to get records to display in list view.

Email Notifications

Human Resources Service Management: Employee Change adds the following email notifications.

Name	Table	Condition	Recipients
HR Company welcome email	HR Employee Change [hr_change]	On an event fired by the Example Employee Onboarding HR workflow.	hr_profile.manager
HR Change assigned to me	HR Employee Change [hr_change]	**Active** is **true** AND **Assigned to** is not empty AND **Assigned to** changes AND On record inserted or updated.	assigned_to
HR Change assigned to my group	HR Employee Change [hr_change]	**Active** is **true** AND **Assigned to** is empty AND **Assignment group** changes AND **Assignment group** is not empty AND On record inserted or updated.	assignment_group
HR Change commented	HR Employee Change [hr_change]	**Active** is **true** AND **Additional comments** changes AND On record updated.	assigned_to,opened_by,opened_for,watch_list
HR Change worknoted	HR Employee Change [hr_change]	**Active** is **true** AND **Assigned to** is not empty AND **Work notes** changes AND On record updated.	assigned_to
HR Change closed	HR Employee Change [hr_change]	'**Active**' is **false** AND On record updated.	assigned_to,opened_for,opened_by,watch_list

Events

Human Resources Service Management: Employee Change adds the following events.

Method Summary	When Triggered
hr_case.assignment_group.changed	On change of the assignment group for an hr_case record.
hr_case.commented	On insertion of a comment on a hr_case record.
hr_case.inserted	On insertion of a new hr_case record.
hr_case.inserted.assigned	On insertion of a new hr_case record that is assigned to an assignment group.
hr_case.inserted.unassigned	On insertion of a new hr_case record that is not assigned to an assignment group.
hr_case.updated	On update of an hr_case record.
hr_change.approved	On approval of an hr_change record.
hr_change.assignment_group.changed	On change of the assignment group for an hr_change record.
hr_change.commented	On insertion of a comment on a hr_change record.
hr_change.inserted	On insertion of a new hr_change record.
hr_change.inserted.assigned	On insertion of a new hr_change record that is assigned to an assignment group.
hr_change.inserted.unassigned	On insertion of a new hr_change record that is not assigned to an assignment group.
hr_change.updated	On update of an hr_change record.

Using Employee Change

Overview

HR employee change provides predefined processes for employee onboarding, information change, and offboarding. Launched from the HR catalog, these processes generate HR change records and launch automated workflows.

You can use these processes as templates, customizing them to meet your needs. Alternatively, you can design new processes for your own organization.

Note: *The request management process used by HR employee change always has approval on, regardless of the HR configuration options.*

Process Flow

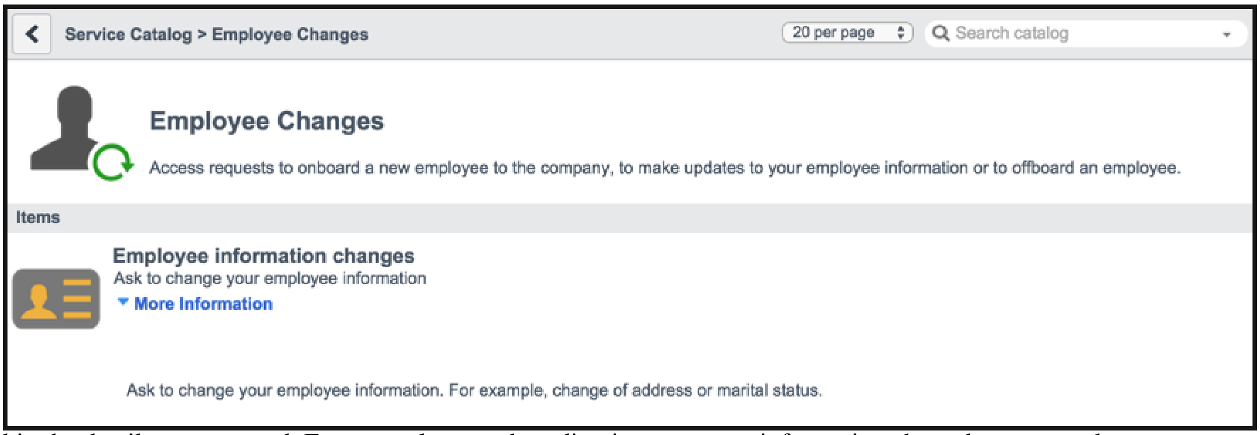
The general flow for all HR employee change processes is:

1. A user submits a request that creates an HR change record and may also create an HR profile record.
2. Depending on the process, an approval workflow may launch. If so, an approver in the HR group can review and approve or reject the request.
3. On approval, workflows may generate fulfillment tasks, including:
   - HR tasks for the HR department.
   - Non-HR tasks as service catalog requests for other departments.
4. The appropriate teams involved in the process can then fulfill these tasks.
5. After all fulfillment tasks have been closed, the HR change record is closed.

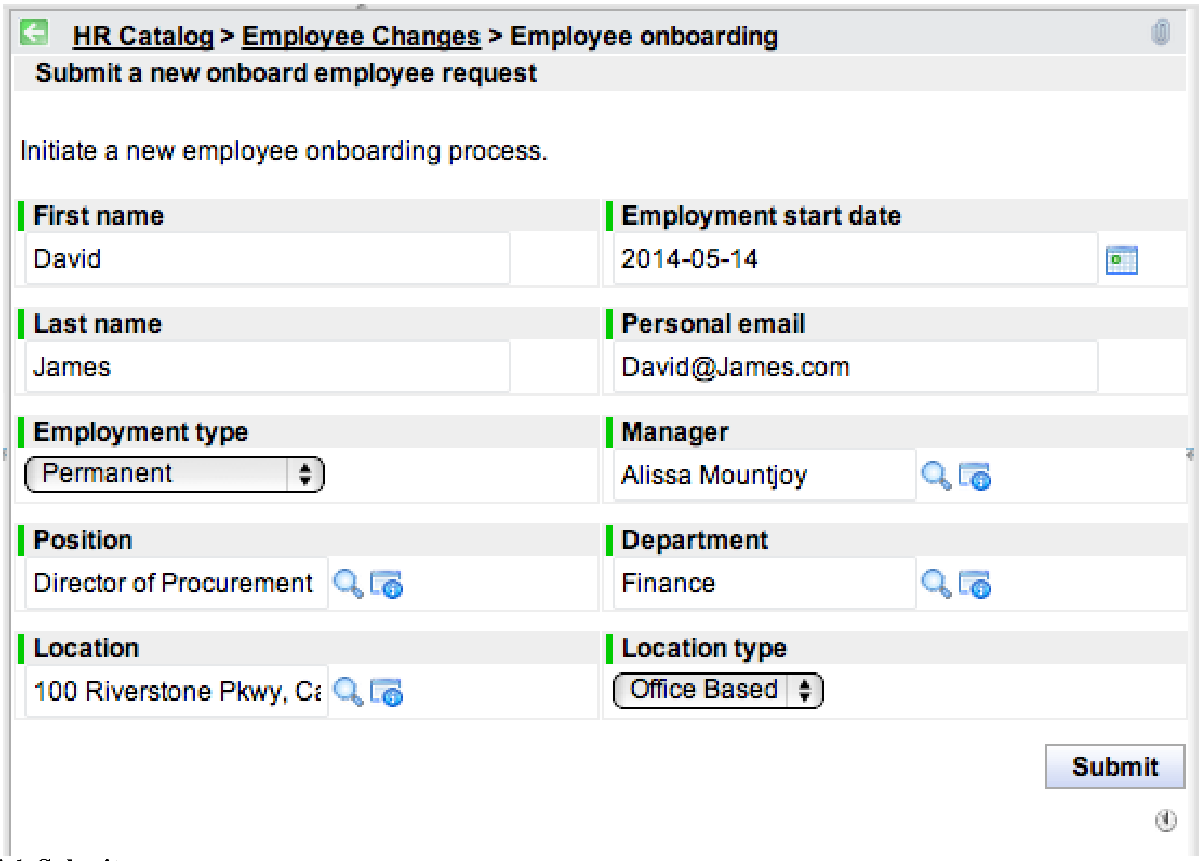
Creating HR Change Records

HR change records are generated as types of HR case records, typically using a service catalog request.

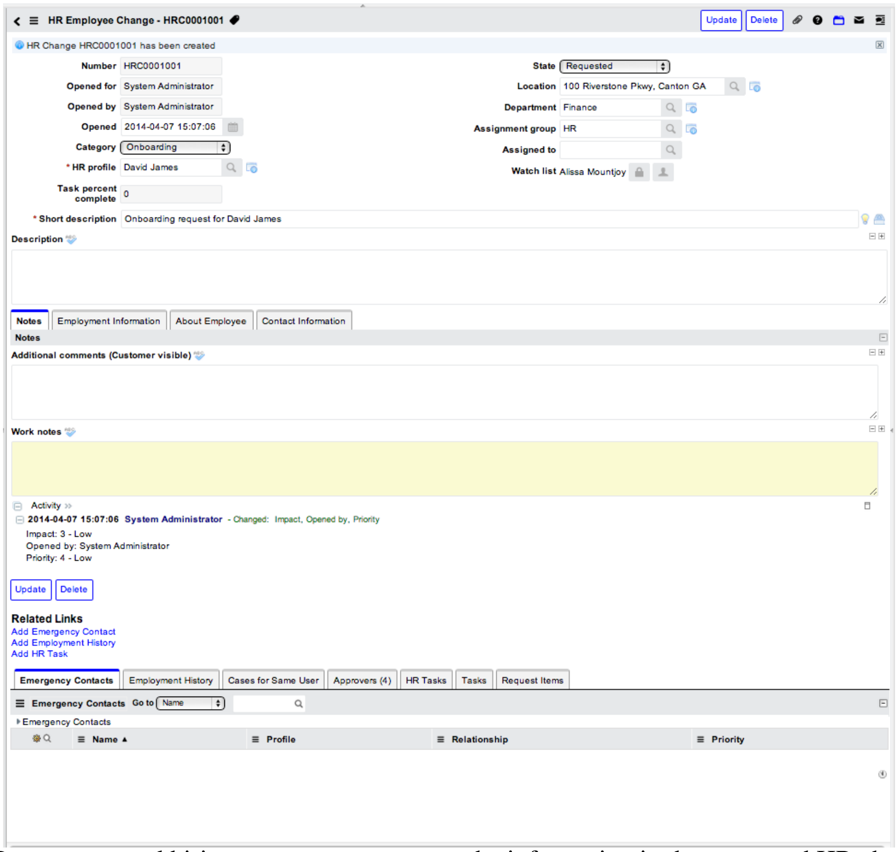
1. Navigate to **Self-Service > HR Catalog**.
2. Select the **Employee Changes** category.
3. Select the appropriate HR item.



4. Fill in the details as prompted. For example, an onboarding item requests information about the new employee.



5. Click **Submit**.



6. HR managers and hiring managers can access the information in the generated HR change record, and can contribute information such as employment details, as required.

   The HR change record displays fulfillment progress in the **Task percent complete** field.
7. A new HR profile record may now be created to contain information about the employee, such as personal phone number and emergency contacts.
   - For onboarding requests, a new profile record is automatically created.
   - For offboarding requests and information change requests, a new profile is created if one does not exist for that employee.

Viewing HR Change Records

As HR change records are types of HR case, you can view them as other cases:

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

   Alternatively, you can view a filtered list of change records in the **Assigned to me**, **Open**, **Open - Unassigned**, or **Closed**.
2. [Optional] Sort by the appropriate HR change category to filter the list further.
3. Open a record to see the details.

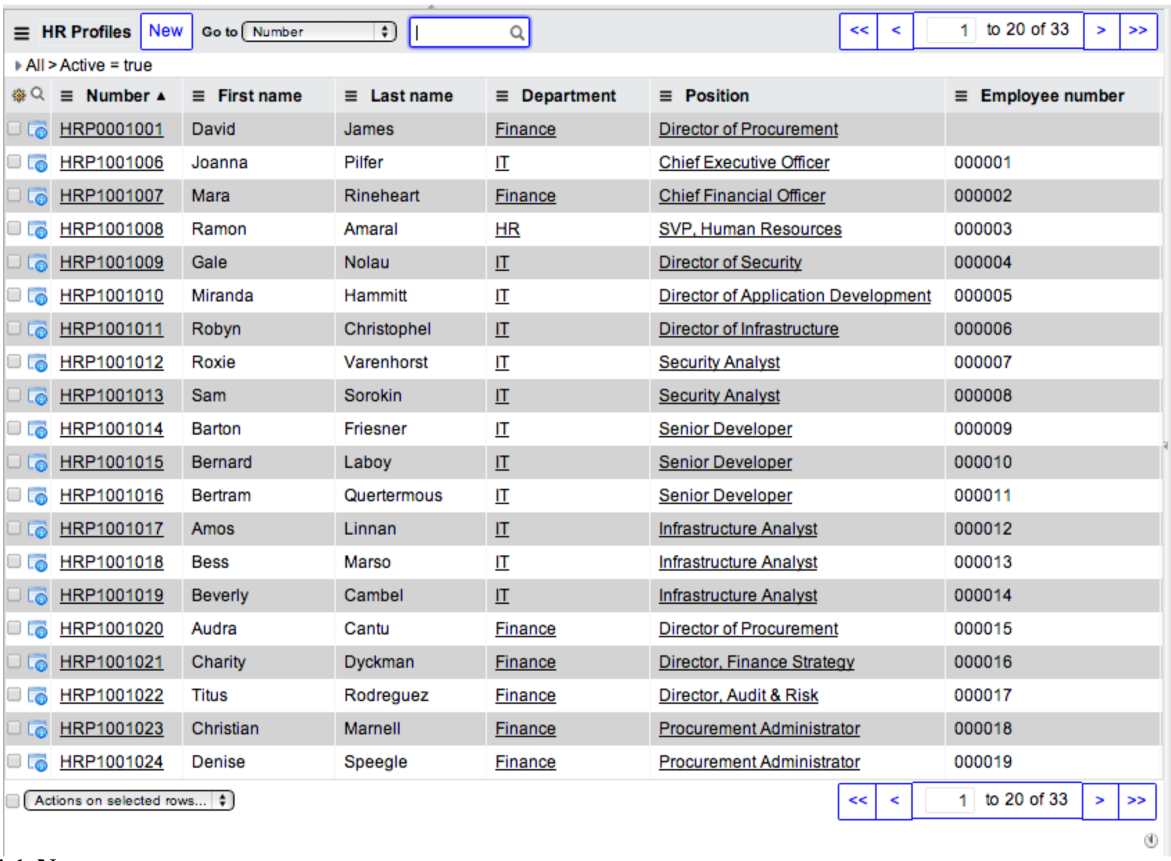
Creating HR Profile Records

HR profile records store employee data, such as name, personal contact information, and emergency contacts. HR profile records allow HR managers to access and track this information through the period of employment and beyond. HR profile records are associated to user records, but unlike user records, HR profile records are stored confidentially and are not publicly viewable.

HR profile records are often created as part of an HR change request process. For example, the default onboarding process creates an HR profile record for the new employee, and automatically associates this to the employee's user record.

HR managers can also create HR profile records manually, if needed.

1. Navigate to **Human Resources > Organization > User Profiles**.



HR Profiles New Go to Number

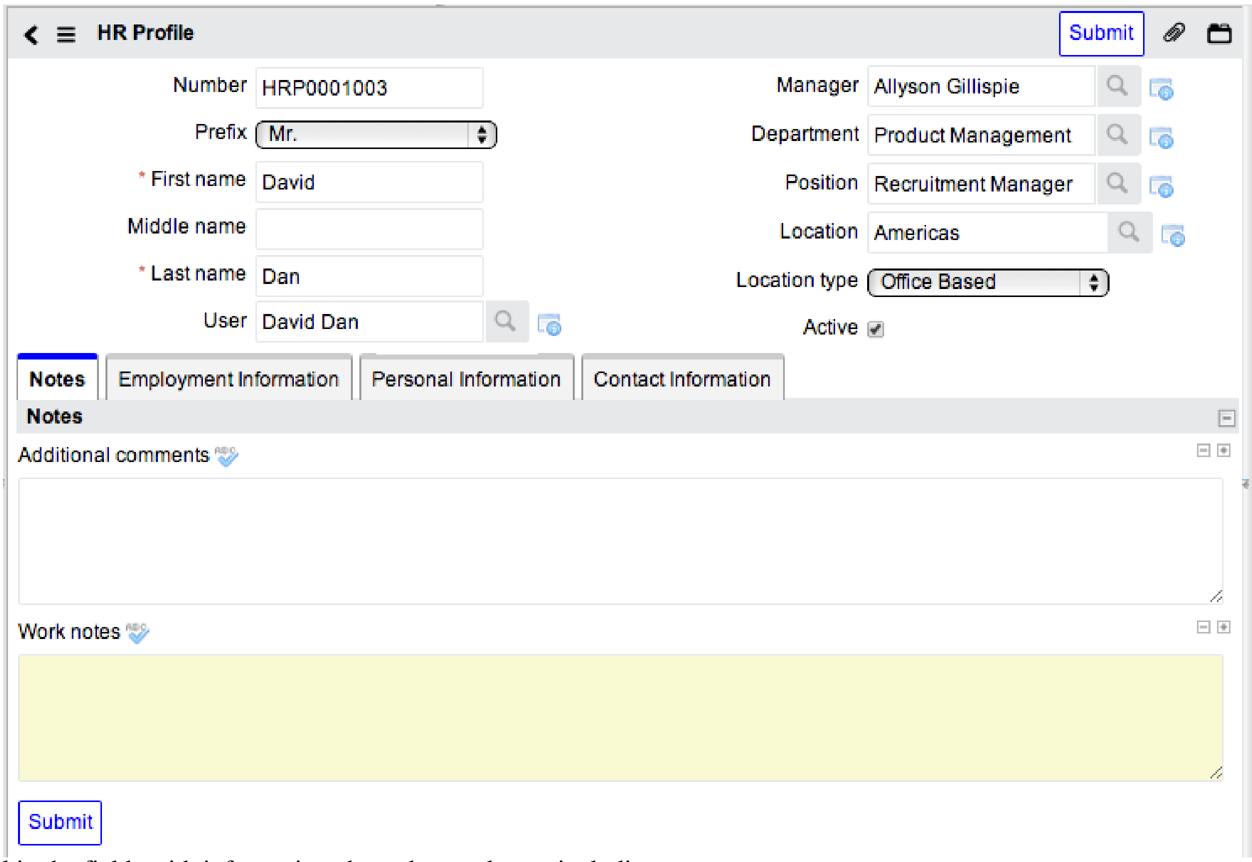
<< < 1 to 20 of 33 > >>

All > Active = true

Number ▲	First name	Last name	Department	Position	Employee number
HRP0001001	David	James	Finance	Director of Procurement	
HRP1001006	Joanna	Pilfer	IT	Chief Executive Officer	000001
HRP1001007	Mara	Rineheart	Finance	Chief Financial Officer	000002
HRP1001008	Ramon	Amaral	HR	SVP, Human Resources	000003
HRP1001009	Gale	Nolau	IT	Director of Security	000004
HRP1001010	Miranda	Hammitt	IT	Director of Application Development	000005
HRP1001011	Robyn	Christophel	IT	Director of Infrastructure	000006
HRP1001012	Roxie	Varenhorst	IT	Security Analyst	000007
HRP1001013	Sam	Sorokin	IT	Security Analyst	000008
HRP1001014	Barton	Friesner	IT	Senior Developer	000009
HRP1001015	Bernard	Laboy	IT	Senior Developer	000010
HRP1001016	Bertram	Quertermous	IT	Senior Developer	000011
HRP1001017	Amos	Linnan	IT	Infrastructure Analyst	000012
HRP1001018	Bess	Marso	IT	Infrastructure Analyst	000013
HRP1001019	Beverly	Cambel	IT	Infrastructure Analyst	000014
HRP1001020	Audra	Cantu	Finance	Director of Procurement	000015
HRP1001021	Charity	Dyckman	Finance	Director, Finance Strategy	000016
HRP1001022	Titus	Rodreguez	Finance	Director, Audit & Risk	000017
HRP1001023	Christian	Marnell	Finance	Procurement Administrator	000018
HRP1001024	Denise	Speegle	Finance	Procurement Administrator	000019

Actions on selected rows... << < 1 to 20 of 33 > >>

2. Click **New**.

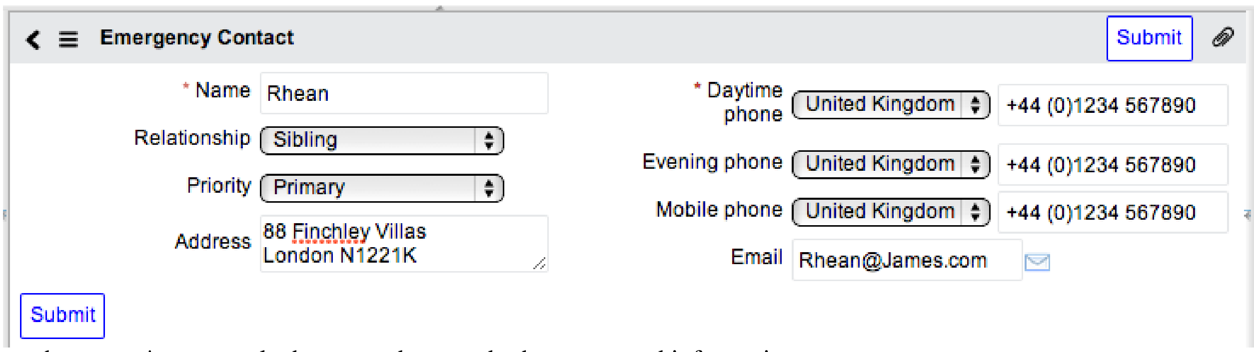


3. Fill in the fields with information about the employee, including:
   - The employee's department, position, location.
   - In the **User** field, the employee user record to associate to this profile record. This ensures further changes made to information shared across both records are synchronized, such as the employee's last name.
4. Right-click on the form header and select **Save**.
5. [Optional] Add emergency contacts and past employment information, and view that employee's direct reports and colleagues.
6. Click **Submit**.

Adding Emergency Contacts

To add information about who to contact in case of an emergency affecting the employee:

1. On the HR profile record.
2. Click **New** in the **Emergency Contacts** related list.



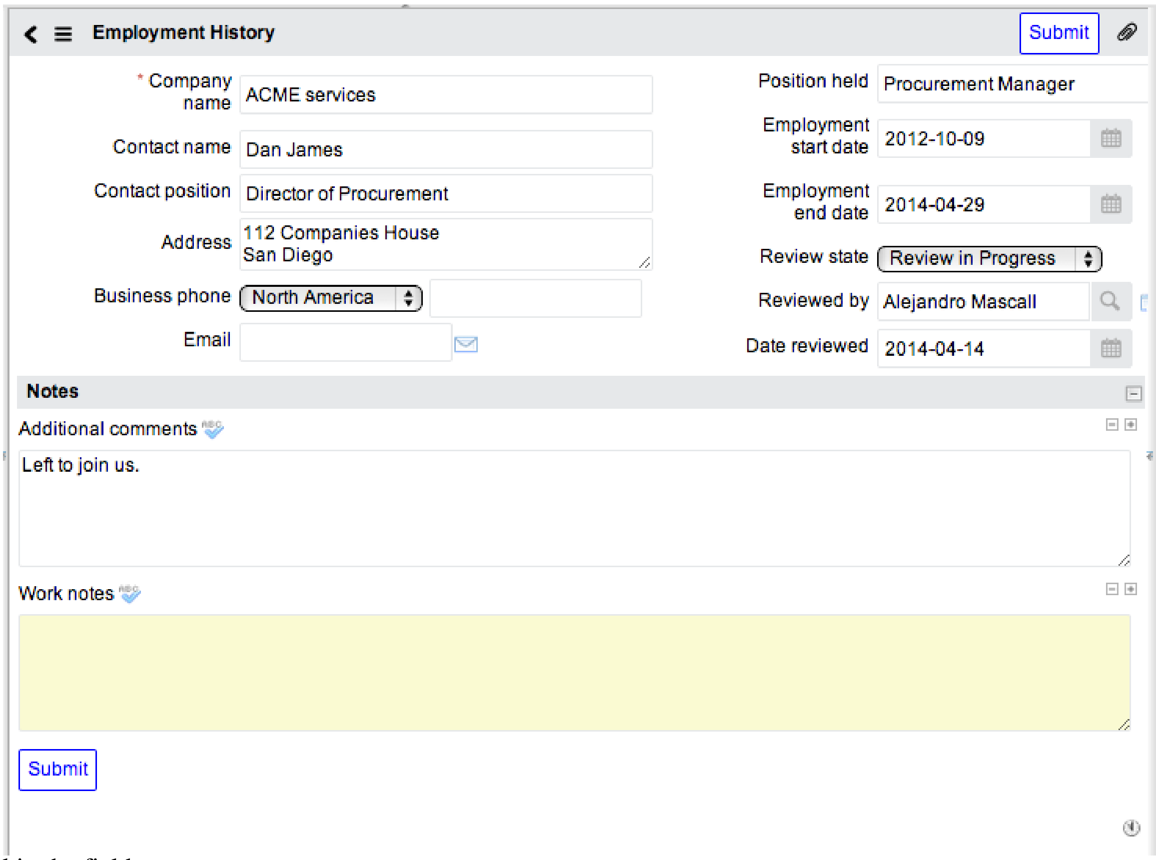
3. Enter the person's name, telephone numbers, and other requested information.
4. Click **Submit**.

Adding Employment History

Employment history records have information about the employee's previous employment, including company name, employment start and end dates, and position held. This information is typically provided by new employees as part of the onboarding process to allow HR staff to conduct reference and background checks.

To add past employment information:

1. On the HR profile record, click **New** in the **Employment History** related list.



2. Fill in the fields.
3. Click **Submit**.

Viewing Direct Reports

The **Direct Reports** related list on the HR profile record shows the employees who report directly to the displayed user.

Viewing Colleagues

The **Colleagues** related list on the HR profile record shows other employees who have the same manager as the displayed user.

Approving Requests

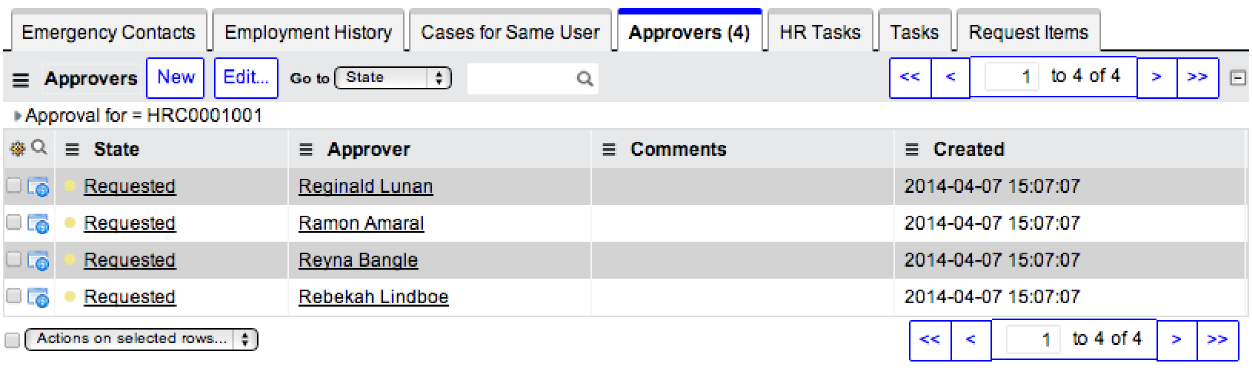
HR employee change requests may require review and approval before the HR change process can proceed. Approvals can be assigned to individual users or members of a specified group. For example, the predefined HR employee change processes define as approvers all users belonging to the HR group. The first approval response to the request is always taken, to approve or reject the request.

Onboarding and offboarding requests always require approvals. Information change requests may require approvals, depending on whether the user has write access to the information to change.

If an approval is required:

1. The workflow sends an email notification to all approvers to advise them that an approval is awaiting their attention.
2. One of the approvers must then open the HR change record by either:
   - Clicking on the link provided in the email.
   - Navigating to **Human Resources > My Approvals**, then selecting the appropriate record.
3. The approver clicks **Approve** or **Reject**, which updates the record state accordingly.
4. The approval is then processed:
   - If the request is approved, the process continues and the HR change record state moves to Work in Progress.
   - If the request is rejected, the process terminates, the HR change record state moves to Closed Incomplete.

Approvers for a change are shown in the **Approvers** related list for that HR change record.



State	Approver	Comments	Created
Requested	Reginald Lunan		2014-04-07 15:07:07
Requested	Ramon Amaral		2014-04-07 15:07:07
Requested	Reyna Bangle		2014-04-07 15:07:07
Requested	Rebekah Lindboe		2014-04-07 15:07:07

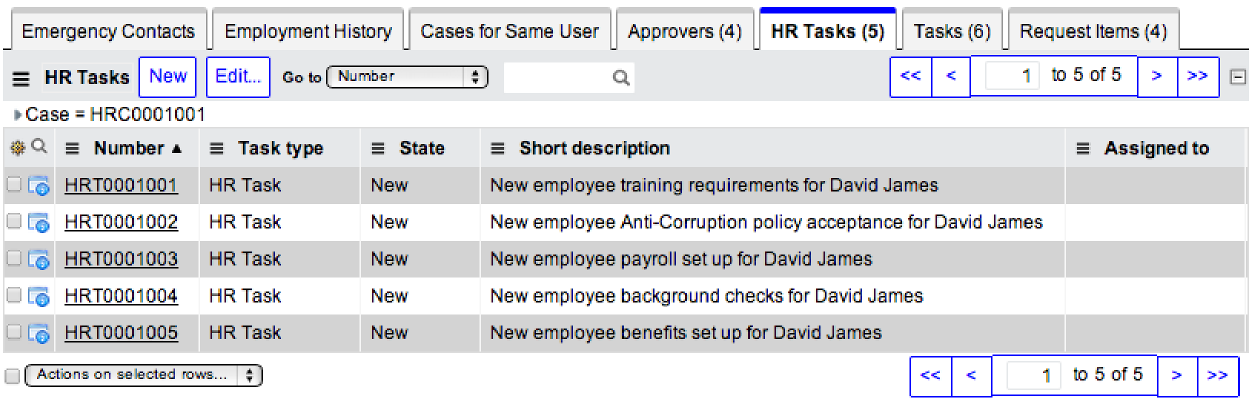
Generating Fulfillment Tasks

After an HR change record is approved, the workflow automatically generates tasks that must be performed to complete the request. These can include:

- HR tasks for the HR team to perform.
- Service catalog requests containing requested items for other teams to fulfill.

HR Tasks

HR tasks define work for members of the HR team, and appear in the **HR Tasks** related list for the relevant HR change record.



Number ▲	Task type	State	Short description	Assigned to
HRT0001001	HR Task	New	New employee training requirements for David James	
HRT0001002	HR Task	New	New employee Anti-Corruption policy acceptance for David James	
HRT0001003	HR Task	New	New employee payroll set up for David James	
HRT0001004	HR Task	New	New employee background checks for David James	
HRT0001005	HR Task	New	New employee benefits set up for David James	

An onboarding request generates the following HR tasks:

- New employee payroll set up
- New employee background checks
- New employee anti-corruption policy acceptance
- New employee benefits set up
- New employee training requirements

An offboarding request generates the following HR tasks:

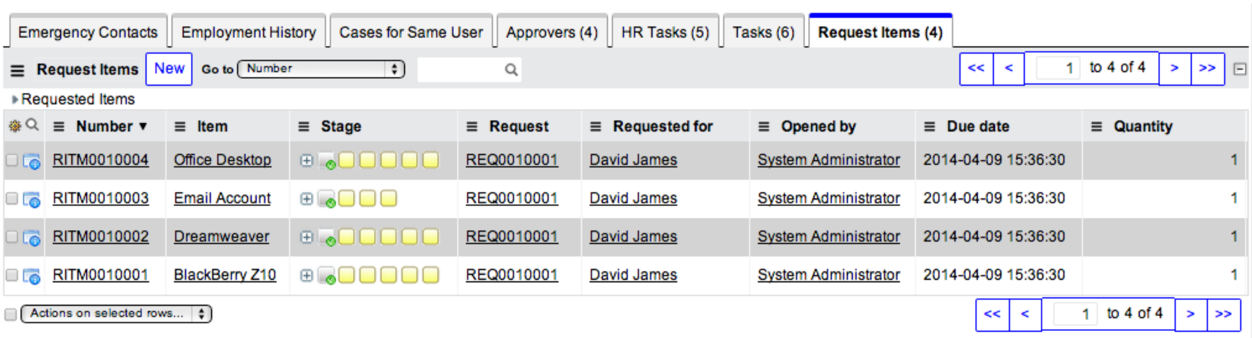
- Terminate payroll
- Terminate benefits
- Conduct exit interview
- Send departure literature and documentation

An information change request does not generate HR tasks.

Generating Requested Items

Requested items define work to be carried out by non-HR teams. They are generated by an order guide based on information in the HR employee change request.

Requested items appear in the **Request Items** related list for that change.



Number	Item	Stage	Request	Requested for	Opened by	Due date	Quantity
RITM0010004	Office Desktop		REQ0010001	David James	System Administrator	2014-04-09 15:36:30	1
RITM0010003	Email Account		REQ0010001	David James	System Administrator	2014-04-09 15:36:30	1
RITM0010002	Dreamweaver		REQ0010001	David James	System Administrator	2014-04-09 15:36:30	1
RITM0010001	BlackBerry Z10		REQ0010001	David James	System Administrator	2014-04-09 15:36:30	1

An onboarding request generates requested items based on the new employee's employment type, department, and location type. So if the employee is a permanent employee, office-based, and working in development, the order guide generates the following requested items:

- Email Account
- Dreamweaver
- Development Laptop
- BlackBerry Z10

An offboarding request generates a service catalog request that contains retrieval tasks for all assets, which were assigned to the employee using asset management.

An information change request does not generate requested items.

Customizing Processes

Overview

HR employee change allows administrators to design and maintain HR processes for your organization. For example, you can customize the predefined onboarding, offboarding, and information change processes. You can also define your own processes to fit your organization's requirements, such as creating a new HR process to deal with disciplinary procedures.

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.

After you have defined the process, the relevant department can own that process, and can define and maintain the rules and conditions for the process. For example, an onboarding process owner can specify that an employee doing a lot of traveling requires a laptop, but an employee based mainly in one location should be given a desktop.

HR Employee Change Components

HR employee change components are provided as examples and as capability functions.

Examples are components that you can modify or replace when you design your own processes. These examples include:

- The predefined processes provided for onboarding, offboarding, and information change.
- The Example IT Employee Onboarding Action and Example IT Employee Offboarding Action script actions that execute code for the service domain.
- Workflows that create HR and IT tasks.
- The order guide that creates catalog requests.
- Record producers that launch employee change processes.

Capability functions are components that work by default with your customized processes, so they do not require alteration. Although, you can still modify capability functions to accomplish things like extending the HR profile table to capture additional information. These capability functions include:

- HR Profile table
- HR Position table
- HR Change table
- Script Includes

Designing an HR Process

A typical process flow for designing a new workflow-based HR process is:

1. Design the process stages, outlining at a high-level the process flow.
2. Create or customize a record producer that will create the HR change record.
3. Create the workflow to process the request, including any relevant:
    - Approvals: to review and approve or reject the request. For example, to approve an onboarding request.
    - Automated assignment: to direct the request to a specific individual or group using assignment rules. For example, to define that all benefits change records should be assigned to a specific user within the HR team.
    - Email notifications: to alert an HR team member or a group within HR about the request. For example, a notification when an employee requests to change sensitive data.

- Fulfillment tasks: HR tasks for the HR department and requested items for other departments, to fulfill for the request. For example, an HR task for the HR department to process pension provision when an employee retires.

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

Designing Process Stages

When you start designing a process, start by outlining the stages within that process.

For example, a typical onboarding process may contain the following stages.

Stage	Description
Capture Information	After an employment offer has been made and accepted, capture basic information from HR staff, the employee's hiring manager, and the new employee. Use this information to create an HR change and HR profile for the employee, then request approval for onboarding.
Approval	Approve the onboarding request, then generate the tasks for this work, including: • HR tasks to be fulfilled by the HR department. For example, perform reference checks. • Non-HR tasks, created as service catalog requested items, to be fulfilled by non-HR departments. For example, a set of requested items for the IT department to provide relevant hardware and software to the new employee.
Fulfillment	Fulfill the generated tasks required for onboarding.
Start Date	When the employee joins, perform such actions as: • Resetting the employee's password or unlocking the employee's Active Directory account. • Adding roles to the employee. • Sending a welcome email to the employee's team.

Creating or Customizing Record Producers

Use record producers to generate HR change records from the service catalog. You can create a new record producer for a new process, or customize an existing record producer to customize an existing HR process.

1. Navigate to **Service Catalog > Catalog Definition > Record Producers**.
2. Select **New** to create a new record producer, or open a record such as **Employee onboarding** to customize an existing record producer.
3. Create or modify the record producer as standard, to generate an HR Employee Change [hr_change] record.
4. Make sure the **Script** field includes the following:

```
hr_Factory.wrap (current, gs).configure (producer, "employee_change",
"<HR change category>");
```

   where **employee_change** is the HR Case type and **<HR change category>** is the category, such as **onboarding**.

5. Verify that variable names match column names in the HR Profile [hr_profile] table. For example, to have a record producer variable **personal_email**, there must be a matching field named **personal_email** in the hr_profile table.

   This ensures that the value entered in the record producer is automatically populated in the HR profile and corresponding HR change.

6. If you are customizing an existing record producer:

- For onboarding record producers, ensure the following variables are entered in an onboarding request, so that corresponding mandatory fields in the HR profile are populated correctly: **First name**, **Last name**, **Personal email**, and **Change date**.
- For offboarding record producers, ensure the following variables are entered: **Employee to offboard**, **Offboard type**, and **Employment end date**.
- For employee information change record producers, ensure the variable names match the field names on the HR Profile table to allow automated updates of shared data through the Example Employee Change process.

7. Click **Submit** or **Update** as appropriate.

Customizing Profile Information

As part of designing your organization's processes, you may want to customize the way HR profile information is processed.

Extending Profile Information

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

All profile information uses the security model provided with the **hr_ProfileSecurityManager** script include. This ensures all HR profile information is stored securely.

Associating Profiles with User Records

An employee's HR profile record should be associated with the employee's record in the User [sys_user] table to ensure both sets of information for that employee can be accessed conveniently, and that changes to shared information between these two records are synchronized.

With the default employee onboarding process, this association occurs automatically when an HR change is created. As general practice, you should retain automatic association for onboarding processes you design.

Synchronizing Profile and User Information

Fields with identical names and types in both HR profile and user records are automatically synchronized to ensure that shared information is automatically kept up-to-date. If a user with write access to both HR profile and user records updates a field in one of these records which has a corresponding field in the other record, this change is automatically applied to the other record.

For example, if an employee's last name changes because of marriage, and an HR Manager updates that information in the employee's HR profile record, this change is also applied to the equivalent field in the employee's user record.

If you extend the tables and add fields that contain the same information to both tables, ensure that the new field names and types in both tables are identical to enable this synchronization.

Note: *Matching is done against the field names within the relevant tables, not against the field labels displayed on the forms.*

By default, the following fields are synchronized between the HR profile and user records:

- **Prefix**
- **First name**
- **Middle name**
- **Last name**

- **Manager**
- **Department**
- **Location**

Using Events To Launch Processes

You can use events to launch workflow processes, typically when a new HR change record is created.

This process works as follows:

1. When an HR change record is created or modified, an HR fulfillment event occurs.

   For example, the `hr_change.inserted` event occurs when a new HR change record is created.
2. You can use these events to trigger script actions, executing scripts as required and launching workflows.

   For example, the **Example IT Employee Onboarding Action** script action launches the Example Employee Onboarding IT Workflow.

Process Flow for Example Onboarding Process

The default onboarding process starts when an HR manager submits an onboarding request from the HR catalog.

This creates and populates an HR change and an associated HR profile for the new employee, and also triggers the Example Employee Onboarding HR Workflow.

Creating HR Profiles

For employee onboarding, HR profiles are created before the approval flow is triggered to allow confidential comments and work notes to be recorded in the secure HR profile record. This allows sensitive information to be captured at an early stage, if required.

Note: *Before creating a new HR profile, ServiceNow first checks for any existing HR profiles based on the employee's first name, last name, and personal email address. If a matching HR profile already exists, the system uses that HR profile and populates it with the relevant information instead of creating a new HR profile. This prevents duplicate HR profiles that might occur, for example, if a new employee was previously employed at your organization.*

Example Employee Onboarding HR Workflow

The workflow named Example Employee Onboarding HR Workflow sends an email notification, if your instance is configured to send email notifications to all approvers, to advise them that an approval is awaiting their attention.

If the onboarding request is approved:

1. A new user record is created for the employee, populated with the values entered in the request, and linked to both the new HR change and HR profile.
2. The **Opened for** field in the HR change is populated with the user name from the new user record.
3. The state of the HR change becomes **Work in Progress**.
4. The `hr_change.approved` fulfillment event occurs. This launches two subflows:
   - An HR tasks workflow to generate tasks for the HR team to perform.
   - An IT tasks workflow, triggered by the **Example IT Employee Onboarding Action** script action, to generate service catalog requested items for the IT team to fulfill.
5. On the day before the employment start date, a welcome email is sent to the new employee's manager.
6. When all generated HR tasks and requested items are completed:
   - The new employee's HR profile and HR change are updated to set the employment status to **Employed**.

- The HR change is closed.

If the onboarding request is rejected:

1. The HR change 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 employee change record.
4. The onboarding process terminates.

Generating HR Tasks

The HR tasks subflow generates several standard HR tasks for the HR team to perform, such as **New employee payroll set up** and **New employee background checks**.

Generating Requested Items

The IT subflow runs an order guide using the **Scriptable Order Guide** activity to generate service catalog requested items to be fulfilled by the IT team.

The workflow activity executes the following code for the relevant HR change:

```
var parameters = new JSON().decode(current.payload);

//Need to amend the json object to include additional values.
parameters.opened_by = current.opened_by + "";
parameters.requested_for = current.opened_for + "";

answer = new JSON().encode(parameters);
```

The order guide uses rules to specify which items are requested based on questions answered on the onboarding request. For example, all employees receive an email account, but only some employees receive a laptop.

These answers populate variable values, and determine which requested items the order guide generates:

Variable	Description
Employment type	Can be **Temporary**, **Permanent**, or **Fixed Term Contract**.
Department	Refers to a department. For example, **Development**.
Location type	Can be **Office Based**, **Hot Desk**, or **Remote**.

Sending Welcome Email

On the day before the employee starts employment, the `hr_change.welcome_email` event occurs. This triggers an email to the new employee's manager on the employment date, welcoming the new employee and providing some brief information based on the employee's name, position, and department. The employee's manager can then send this email out to a wider group as appropriate.

This email uses the **hr_change.welcome.email** template.

Process Flow for Example Offboarding Process

The default offboarding process starts when an HR manager submits an offboarding request from the HR catalog.

This creates and populates an HR change for the new employee and triggers the Example Employee Offboarding HR Workflow. If the employee does not have an HR profile record, this is also created and populated.

If the offboarding request is approved:

1. The **Employment status** for the HR change and the employee's HR profile are both set to **Offboarding**.
2. The state of the HR change becomes **Work in Progress**.
3. The `hr_change.approved` fulfillment event occurs. This triggers:
   - The Example Employee Offboarding HR Tasks workflow to add HR tasks to the HR change.
   - The **Example IT Employee Offboarding Action** script action to retrieve the employee's assets by generating tasks for each asset assigned to the employee.
4. When the employment end date is reached and the Example Employee Offboarding HR Tasks workflow is completed:
   - The state of the HR change becomes **Closed Complete**.
   - The employment status for the HR change and HR profile are both set to **Previous employee**.
   - The HR change and HR profile are both set to inactive.

If the offboarding request is rejected:

- The employment status on the HR change and HR profile is set to **Employed**.
- The state of the HR change becomes **Closed Incomplete**.

Process Flow For Example Information Change Process

The default information change process starts when a user submits an information change request from the HR catalog.

When a user requests a change to employee information, the **User** field automatically shows the current user's name, although users can change the user specified if they have write access to that field. If the specified user already has an HR profile, the record producer places the available data into the corresponding variable fields.

Note: *The **Example Information Change** record producer is a new version of the record producer installed with HR Service Management in the **General Questions** category in the HR Catalog. Activating HR Employee Change moves this record producer to the **Employee Changes** category.*

Submitting the information change request launches the Example Employee Change HR Workflow.

The workflow checks if approvals are needed. Approvals are needed if the user requesting the change does not have permission to create and update the information.

If approval is required, an approval request is sent to each member of the HR group.

If the information change request is approved, or if no approval is required:

1. The relevant HR profile information is updated.
2. The HR change is set to inactive with a state of **Closed Complete**.
3. A comment is added to the HR change with the changed values and the original information.

If the information change request is rejected:

1. The HR change state changes to **Closed Incomplete**.
2. The HR profile is not updated, but a comment is added specifying who rejected the change.

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