Sprint 3 Stories

1. User and Group Management

Technical Specifications:

- a. Create the following groups.
 - Benefits
 - Confidential
 - General HR
 - Payroll
 - Training
- b. Switch to the Global Scope and open one of the groups you created.
- c. Add the OOB Type field on the form.
- d. Click the Lock Icon.
- e. Click the Magnifying Glass Icon.
- f. Create a new Group Type called HR.
- g. Set the new Group Type you created on all HR Groups that you created.
- h. Switch back to your Human Resource Scope.
- i. Navigate to the Dictionary of the Assignment Group field on the HR Ticket.
- j. Create a Dictionary Override.
- k. Check the Override reference qualifier checkbox to type=243d71fc47df7110eec87258946d4336.
 - **Note** that you must replace the sys_id above with the sys_id of the HR group type you created in **Step f.**
 - **Note** that once you create this dictionary override you should only see the HR groups you created on the assignment group field on HR tickets.
- I. Do the same steps for the Assignment group field on HR tasks.
- m. Load the HR User Load excel file via import sets.
 - Navigate to Load Data from the Left nav.
 - Create Table.
 - Supply a Label.
 - Click Choose file and upload the HR User Load spreadsheet.
 - Click Submit.
 - Click Create transform map.
 - Supply a name of the transform map.
 - Set Target table to sys_user.
 - Click the Auto Map Matching Fields related link.
 - Set the coalesce field of the user id row to true. This can be found on the Field Maps related list.
 - Click the Transform related link.
 - Click the Transform button.

The expectation is that all users on the file will be created. Note that you are not to manually create these users.

- n. Load the HR Group Membership file via import sets.
 - Follow the same steps above. Make the necessary Label changes as necessary.
 - Use sys_user_grmember as the Target table of the transform map.
 - Set both group and user rows as the coalesce value.

The expectation is that the users loaded in step m will be assigned to the groups you created on step A.

Navigate to the Assigned to field dictionary and create a dictionary override. Just click
the Override reference qualifier checkbox and save it. Do this on the assigned to field for
both HR and HR Tasks.

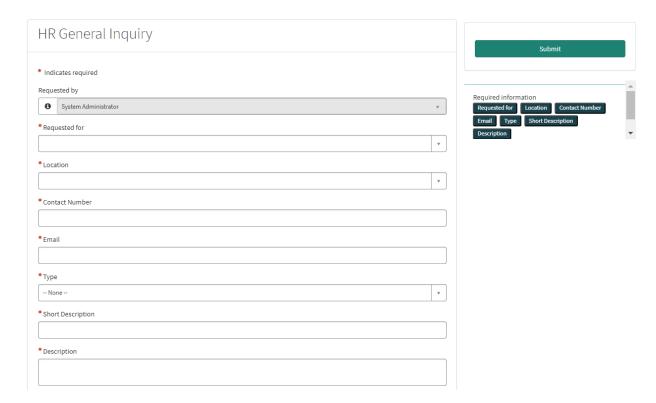
2. Record Producers

Technical Specifications:

HR General Inquiry Record Producer

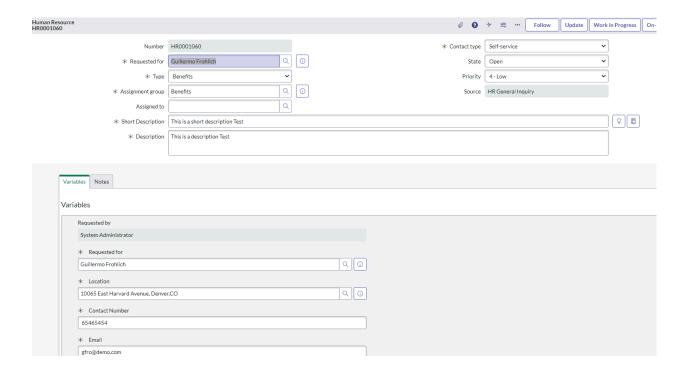
- a. Create a Record Producer called HR General Inquiry.
- b. Set the Catalogs field to Service Catalog
- c. Set Category to Human Resource. Note that you will need to create a new Category.
- d. Create the following Variables.
 - Requested by Reference field to the sys_user table. Read-only and Defaults to the logged in user.
 - Requested for Reference field to the sys_user table. Mandatory and should only contain users that are active.
 - Location Reference to the cmn_location table. Mandatory.
 - Contact Number String field. Mandatory
 - Email String field. Mandatory.
 - Type Select Box. Include None on the Type specifications section of this variable. Mandatory. Add the following Options to this field (Benefits, General HR, Payroll, Training).
 - Short Description Wide Single Line Text. Mandatory.
 - Description Multiline Text. Mandatory.

The form should look like this from the service portal.



- e. Upon submission of the record producer the following fields on the HR ticket should be set according to the requirements below.
 - Requested for Requested for variable on the Record Producer.
 - Type Type variable on the Record Producer.
 - Short Description Short Description on the Record Producer.
 - Description Description on the Record Producer.
 - Contact type Self-service
 - Assignment group the group that matches the selected option on Type.
 - Source The catalog item submitted.

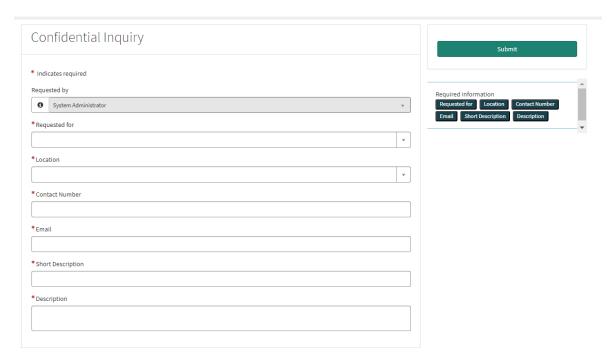
Sample HR Ticket that gets created after the record producer is submitted. Note that the Variables tab should appear since the source is populated. (This is related to the hiding of the variable tab requirement on sprint 1).



Confidential Inquiry Record Producer

- a. Create a Record Producer called Confidential Inquiry.
- b. Set the Catalogs field to Service Catalog
- c. Set Category to Human Resource.
- d. Create the following Variables.
 - Requested by Reference field to the sys_user table. Read-only and Defaults to the logged in user.
 - Requested for Reference field to the sys_user table. Mandatory and should only contain users that are active.
 - Location Reference to the cmn_location table. Mandatory.
 - Contact Number String field. Mandatory
 - Email String field. Mandatory.
 - Short Description Wide Single Line Text. Mandatory.
 - Description Multiline Text. Mandatory.

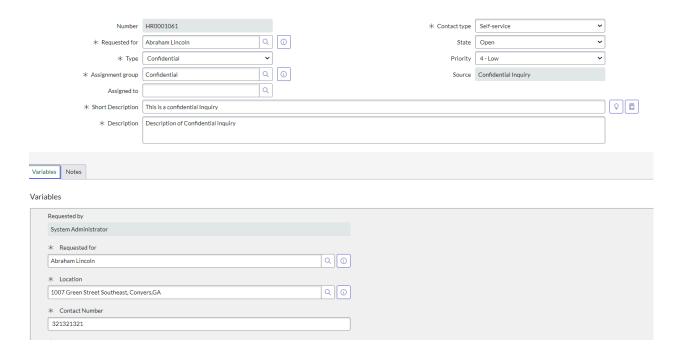
The form should look like this from the service portal.



e. Upon submission of the record producer the following fields on the HR ticket should be set according to the requirements below.

- Requested for Requested for variable on the Record Producer.
- Type Confidential
- Short Description Short Description on the Record Producer.
- Description Description on the Record Producer.
- Contact type Self-service
- Assignment group Confidential Group.
- Source The catalog item submitted.

Sample HR Ticket that gets created after the record producer is submitted. Note that the Variables tab should appear since the source is populated. (This is related to the hiding of the variable tab requirement on sprint 1).



3. Catalog Client Scripts

- a. Create a catalog client script that will auto populate the following variables when the Requested for field changes on the HR Record producers.
 - Location
 - Contact Number
 - Email

4. Client Scripts

- a. Open an Existing HR ticket.
- b. Create a client script that will clear out the assigned to field when the assignment group changes.
- c. Do the same thing for HR Tasks.

Tip:

https://instance-name.service-now.com/sp?id=sc_cat_item&sys_id=3f1dd0320a0a0b99000a53f76 04a2ef9