

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.
- l. 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.

- o. 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.

HR General Inquiry

* Indicates required

Requested by

i System Administrator ▼

* Requested for

▼

* Location

▼

* Contact Number

* Email

* Type

-- None -- ▼

* Short Description

* Description

Submit

Required information

Requested for

Location

Contact Number

Email

Type

Short Description

Description

- 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).

Human Resource
HR0001060

Follow Update Work in Progress On-

Number HR0001060

* Requested for Guillermo Frohlich

* Type Benefits

* Assignment group Benefits

Assigned to

* Short Description This is a short description Test

* Description This is a description Test

* Contact type Self-service

State Open

Priority 4 - Low

Source HR General Inquiry

Variables Notes

Variables

Requested by
System Administrator

* Requested for
Guillermo Frohlich

* Location
10065 East Harvard Avenue, Denver, CO

* Contact Number
65465454

* Email
gfro@demo.com

Confidential Inquiry Record Producer

- Create a Record Producer called Confidential Inquiry.
- Set the Catalogs field to Service Catalog
- Set Category to Human Resource.
- 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.

Confidential Inquiry

* Indicates required

Requested by

System Administrator

* Requested for

* Location

* Contact Number

* Email

* Short Description

* Description

Submit

Required Information

Requested for

Location

Contact Number

Email

Short Description

Description

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).

Number	HR0001061		* Contact type	Self-service
* Requested for	Abraham Lincoln	<input type="text"/>	State	Open
* Type	Confidential	<input type="text"/>	Priority	4 - Low
* Assignment group	Confidential	<input type="text"/>	Source	Confidential Inquiry
Assigned to	<input type="text"/>			
* Short Description	This is a confidential Inquiry			
* Description	Description of Confidential Inquiry			

Variables

Notes

Variables

Requested by

System Administrator

* Requested for

Abraham Lincoln

* Location

1007 Green Street Southeast, Conyers,GA

* Contact Number

321321321

3. Catalog Client Scripts

- 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

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

Tip:

https://instance-name.service-now.com/sp?id=sc_cat_item&sys_id=3f1dd0320a0a0b99000a53f7604a2ef9