knowledge17
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Lab Guide

HR Overview: Configuring Your Instance to Support HR

Gary Kenyon-Leigh & Matt Reinfeldt

Default Login / Password

hradmin / DumbledoreK17

hruser / SnapeK17

employee / HarryK17

Lab Sponsored by Amazon Web Services



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Lab Goal

This lab explains how to set up the HR Profiles, Roles, Groups, and Skills for your HR ServiceNow application.

1. Review HR Profiles
2. Review and Setup HR Groups
3. Review HR Roles
4. Review HR Users tasks

Lab 1.0
The Basics: HR Profiles, Groups and Roles

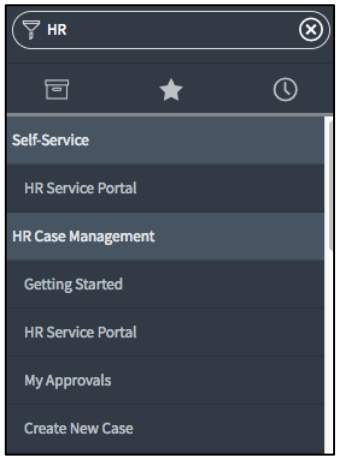
Log on to Your Training ServiceNow Instance

1. Navigate to the unique instance URL provided to you and log on as the **hradmin** user.



Navigation Tip

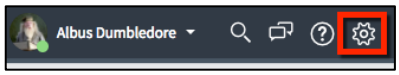
When navigating through ServiceNow, use the filter in the left Navigation pane to limit your options. Typing **HR** into the left navigation pane displays all modules in the Human Resources plugin.



Settings Tip

Enable Developer System Setting to show the Application Picker in the Banner Frame so you can easily switch between different application scopes.

Select the **Settings** cog in the banner frame.

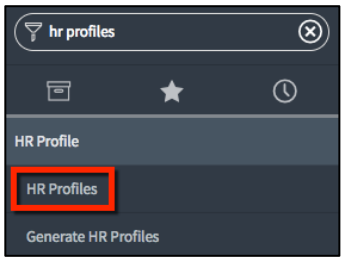


Enable **Show application picker in header**.

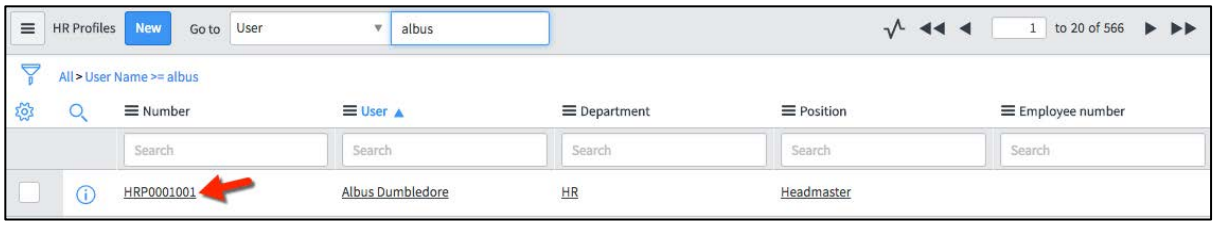


Review HR Profiles

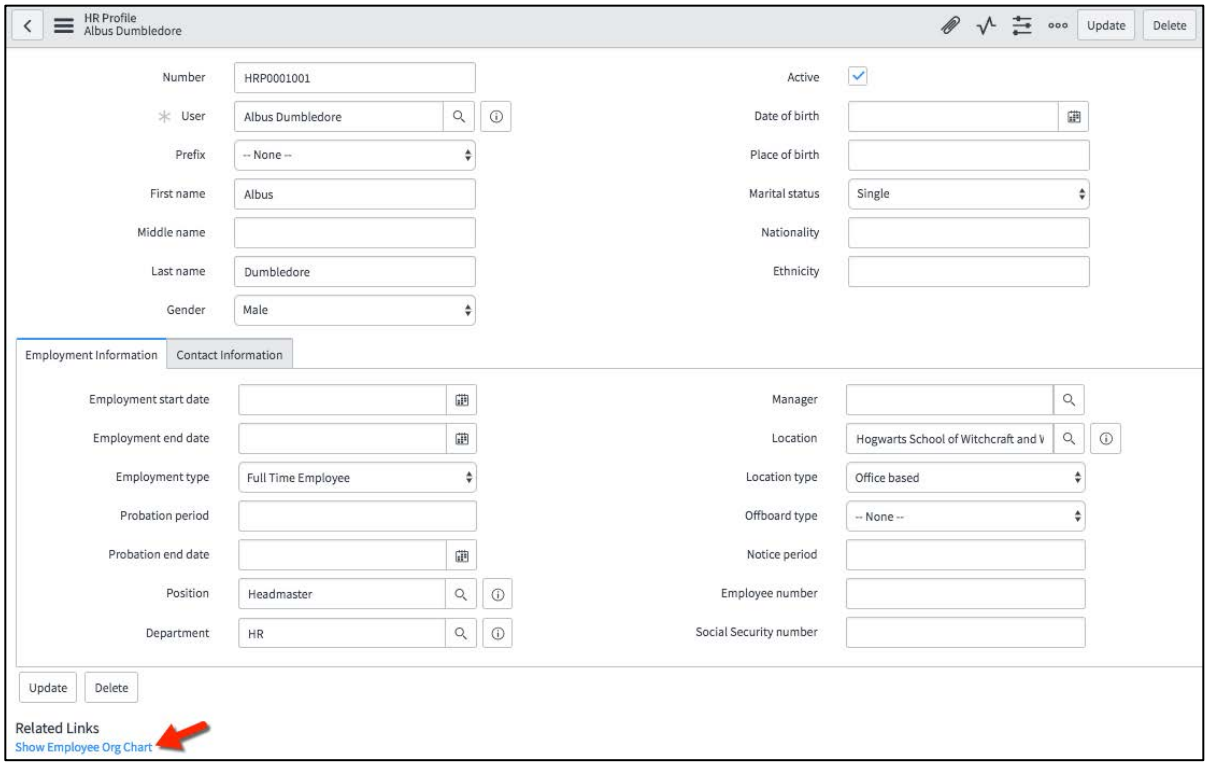
1. Navigate to **HR Profiles**.



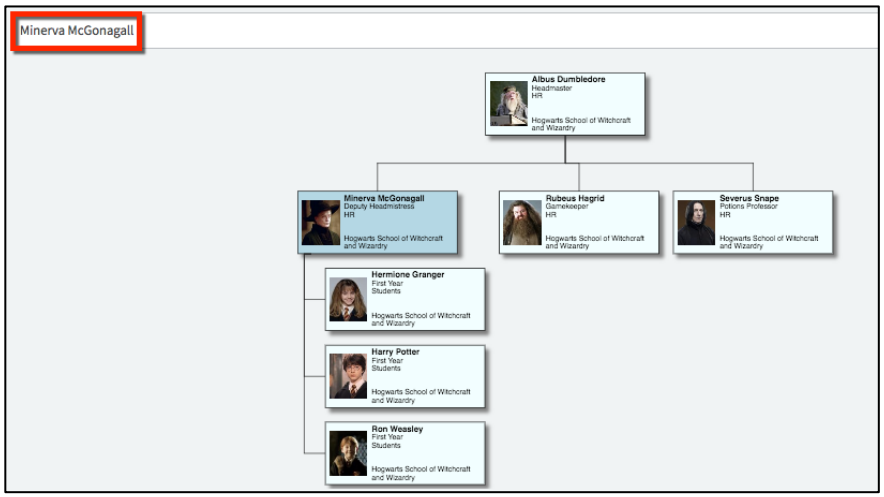
2. Search for **Albus Dumbledore** and select his HR Profile.



3. Review the employee profile fields and then select the **Show Employee Org Chart** link.

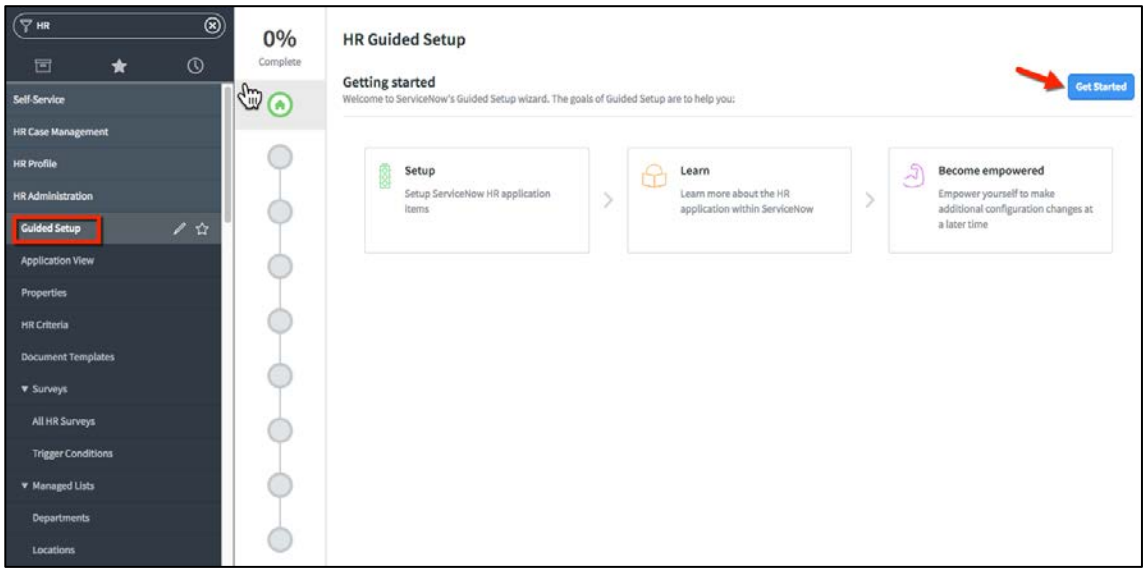


4. Search for **Minerva McGonagall** and review the full organizational chart for the lab.

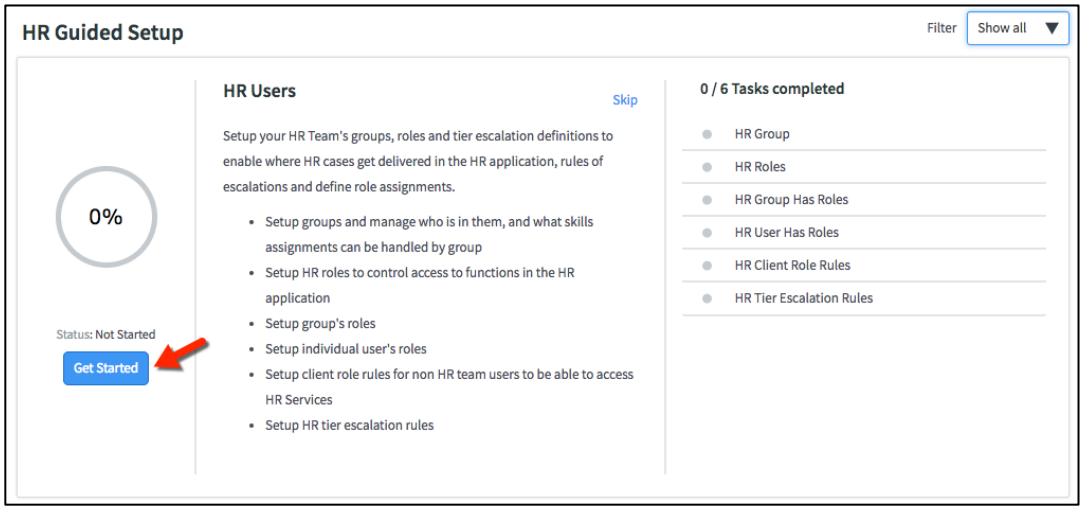


Review and Setup HR Groups

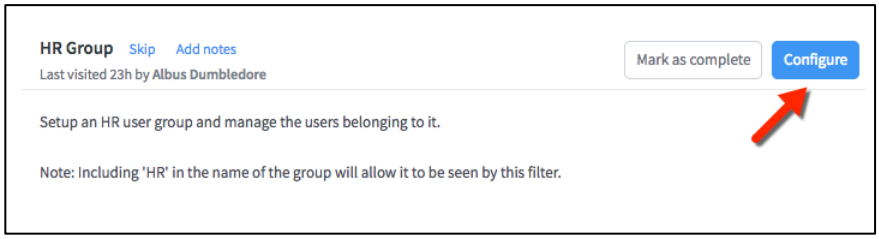
1. Navigate to **Guided Setup** and select **Get Started**.



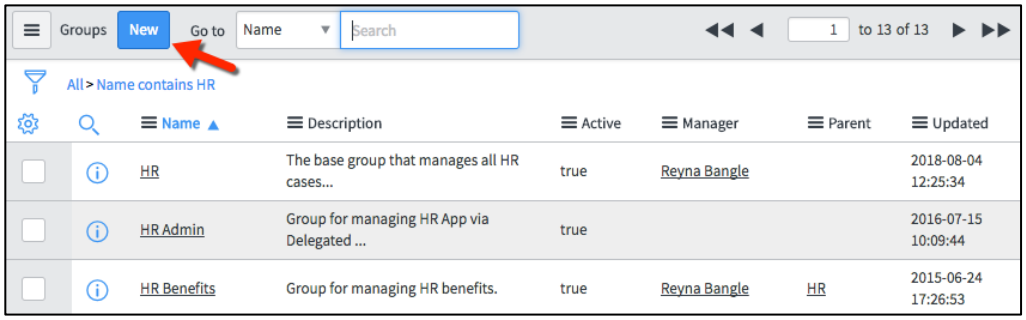
2. Navigate to **HR Users** section and select **Get Started.**



3. Navigate to **HR Group** section and select **Configure.**

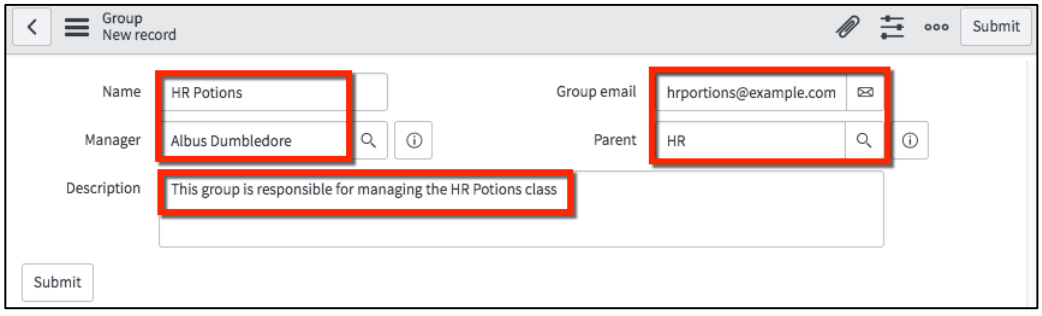


4. Review the list of existing HR Groups and then select **New.**

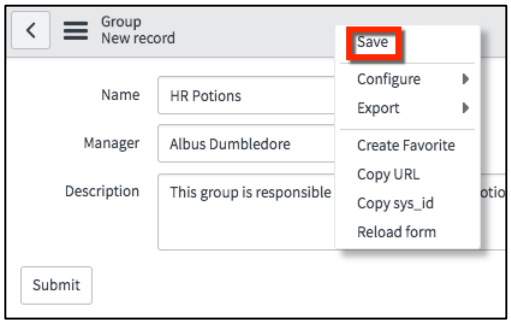


5. Create a new group for **HR Potions**. When the form opens, enter the following values for each of these fields:

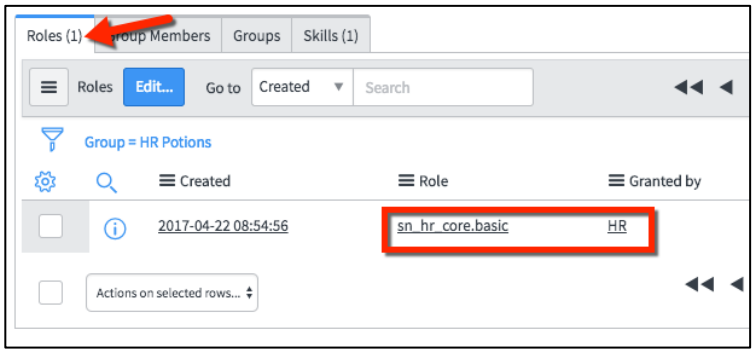
   Name: **HR Potions**
   Manager: **Albus Dumbledore**
   Group email: **hr**potion**s@example.com**
   Parent: **HR**
   Description: **This group is responsible for managing the HR potions class.**



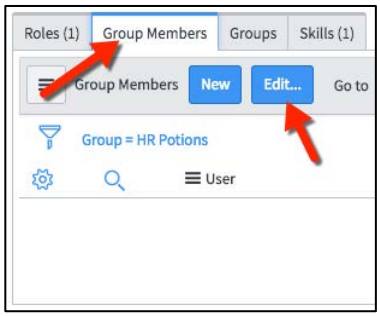
6. Right-click on the header and select **Save**.



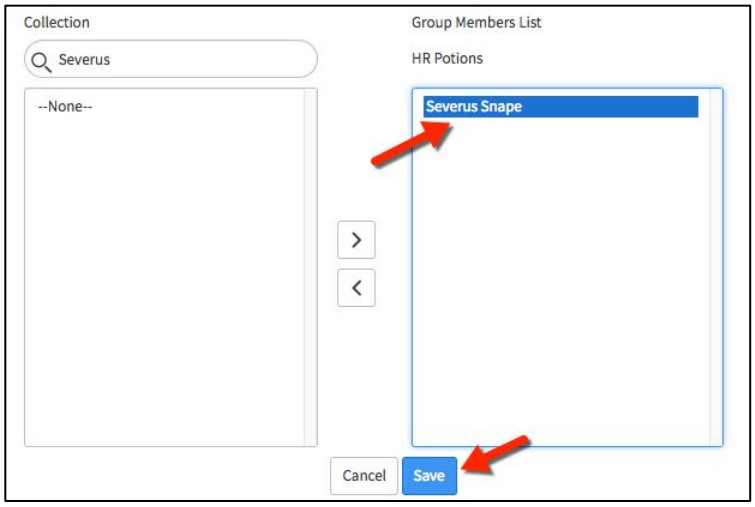
7. Scroll down and click the **Roles** tab. Note that the role **sn_hr_core.basic** is granted by the parent role **HR**.



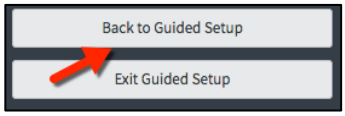
8. Click the **Group Members** tab, and select the **Edit** button.

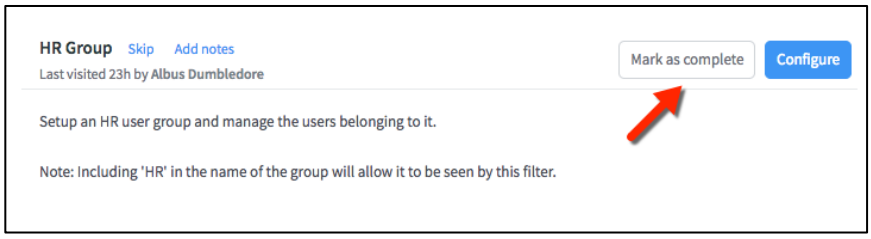


9. Choose **Severus Snape**, click **Save.**



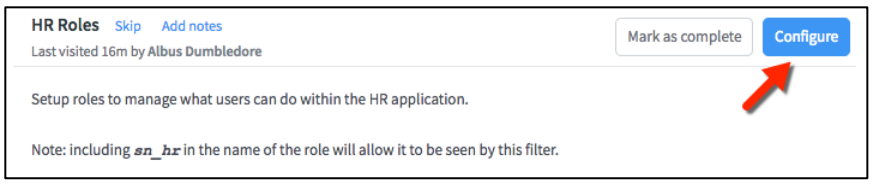
10. Click **Back to Guided Setup** and click **Mark as complete** next to **HR Group** section.



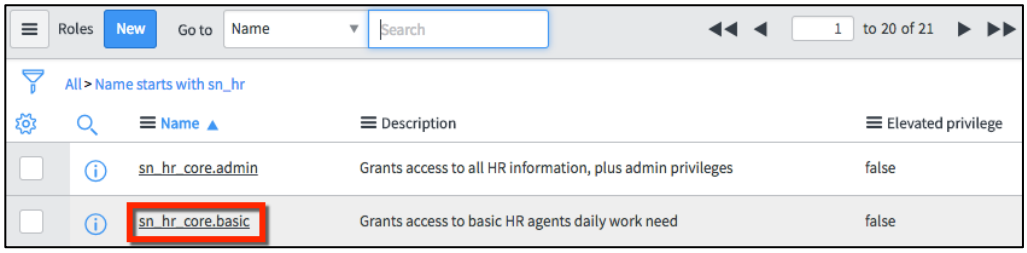


Review HR Roles

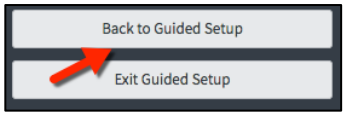
1. Navigate to **HR Roles** section and select **Configure** button.

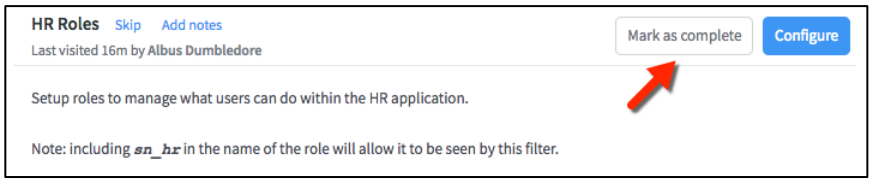


2. Click the **sn_hr_core.basic** role to see more about it. Roles define the Applications, Modules, and tables that a user has access to. Members of the new **HR Potions** group can read, write, and create cases.



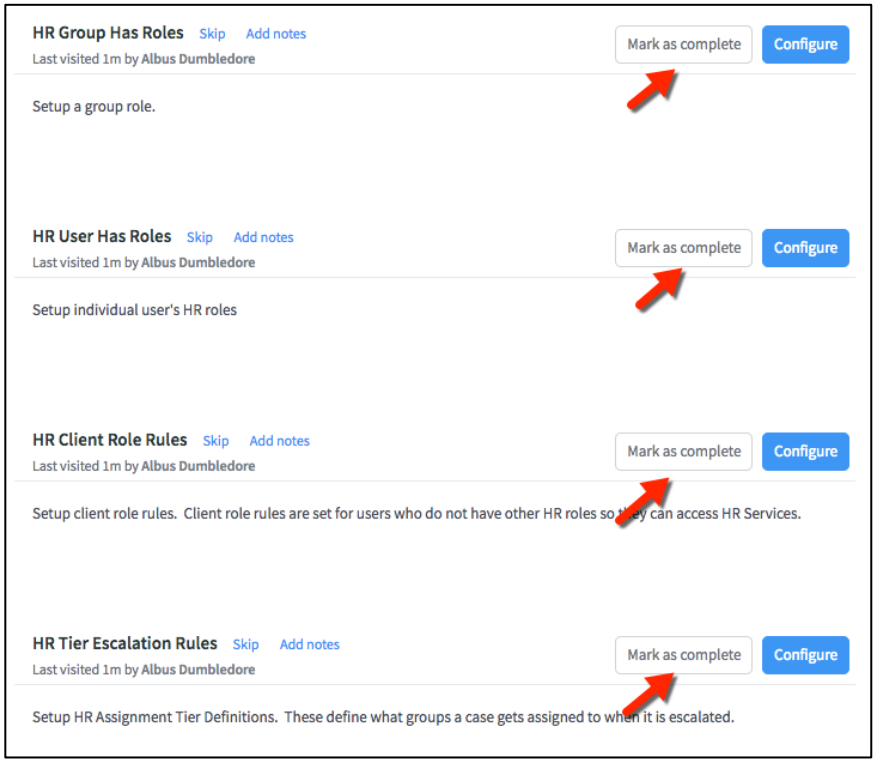
3. Click **Back to Guided Setup** and click **Mark as complete** next to **HR Roles** section.





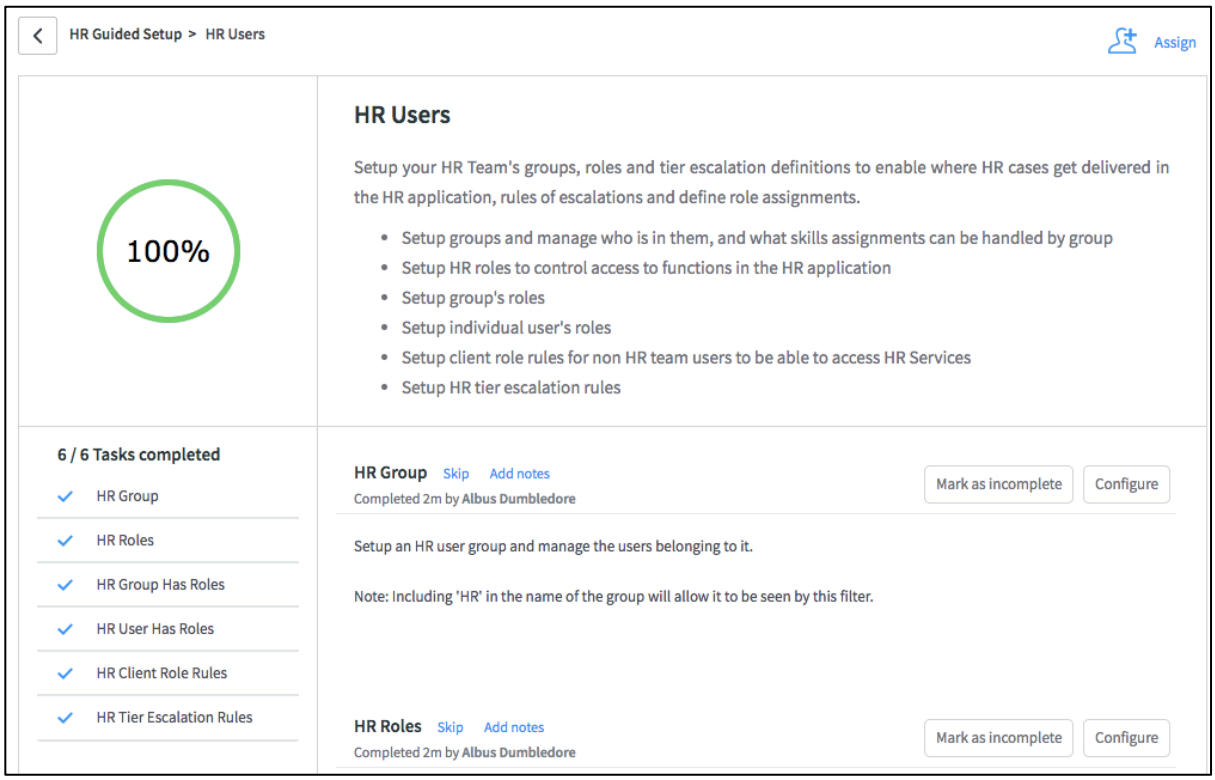
Review HR Users Tasks

1. Navigate to each of the remaining sections on the **HR Users** guided setup**,** review and **Mark as complete.**



Lab Success Verification

1. The **HR Guided Setup** for **HR Users** is 100% complete.



Lab Goal

This lab explains how to set up and configure your company's departments, locations, positions and skills to use within the HR application.

1. Review Departments
2. Review Locations
3. Review Positions
4. Review and Configure Skills

Lab 2.0
HR Company Setup

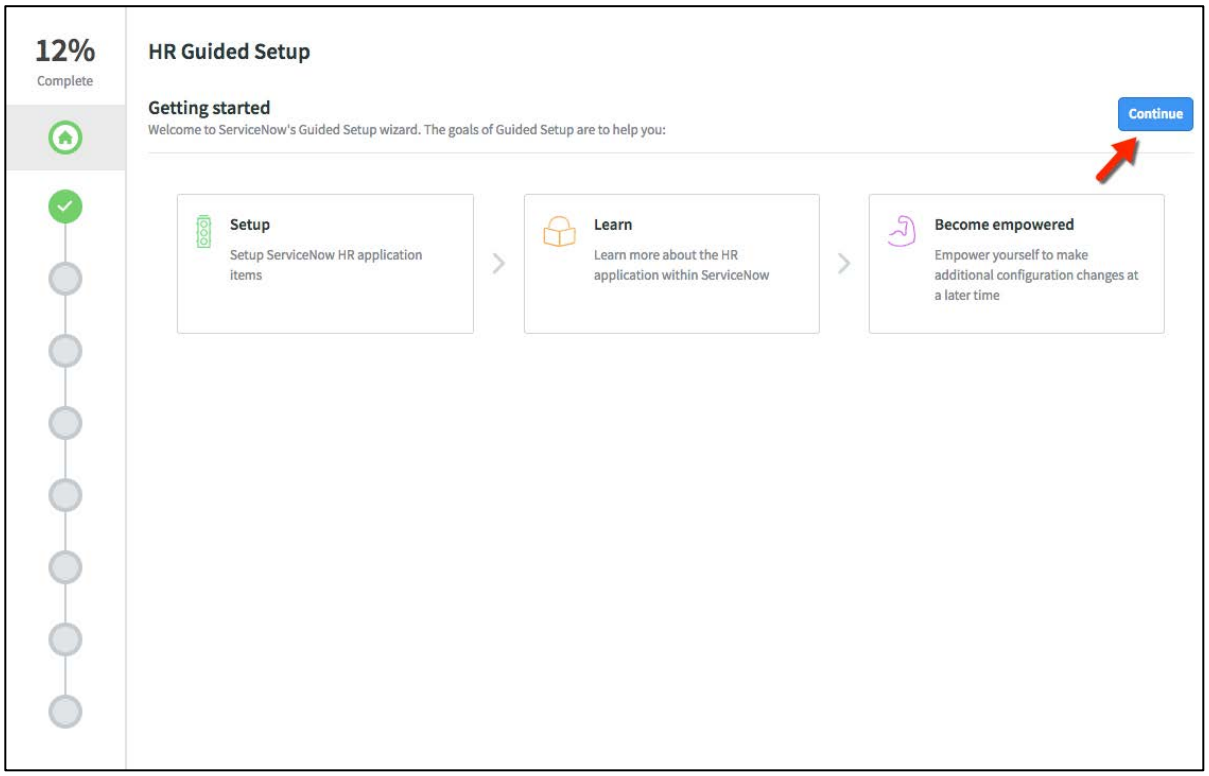
Log onto Your Training ServiceNow Instance

1. Navigate to the unique instance URL provided to you and log on as the **hradmin** user.

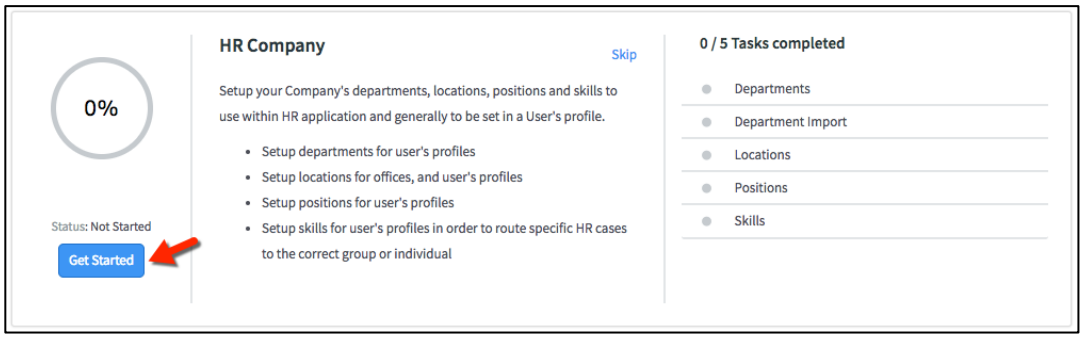


Review Departments

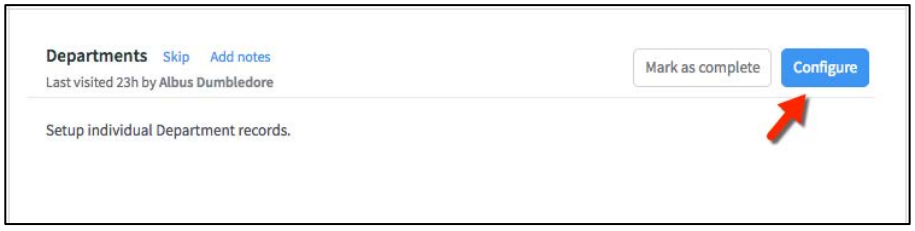
1. Navigate to **Guided Setup** and click the **Continue** button.



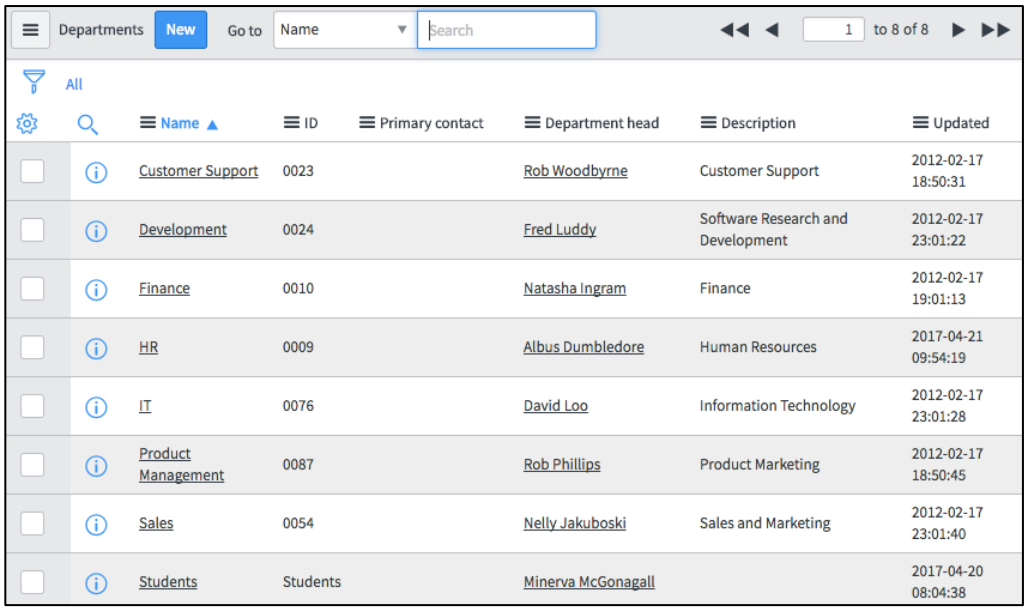
2. Navigate to **HR Company** section and click the **Get Started** button.



3. Navigate to the **Departments** section and click the **Configure** button.

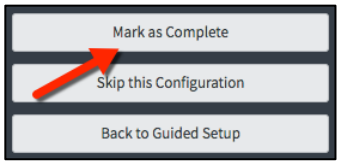


4. Review the configured departments, the lab profiles are using **HR** and **Students.**

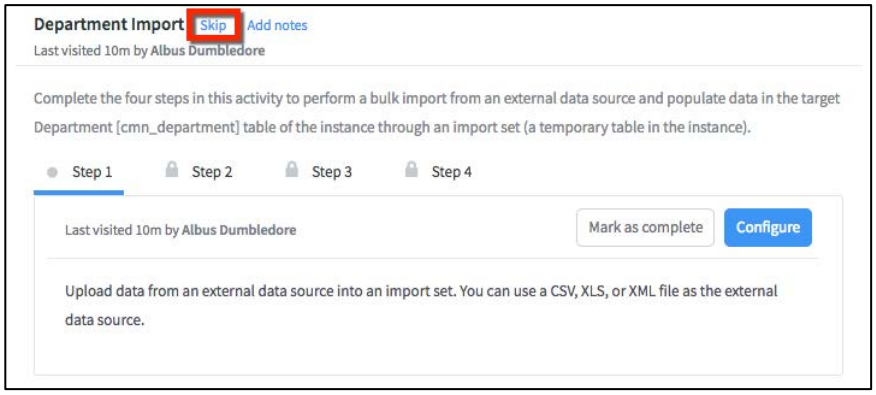


Name	ID	Primary contact	Department head	Description	Updated
Customer Support	0023		Rob Woodbyrne	Customer Support	2012-02-17 18:50:31
Development	0024		Fred Luddy	Software Research and Development	2012-02-17 23:01:22
Finance	0010		Natasha Ingram	Finance	2012-02-17 19:01:13
HR	0009		Albus Dumbledore	Human Resources	2017-04-21 09:54:19
IT	0076		David Loo	Information Technology	2012-02-17 23:01:28
Product Management	0087		Rob Phillips	Product Marketing	2012-02-17 18:50:45
Sales	0054		Nelly Jakuboski	Sales and Marketing	2012-02-17 23:01:40
Students	Students		Minerva McGonagall		2017-04-20 08:04:38

5. Click the **Mark as Complete** button.



6. Navigate to the **Department Import** section and select the **Skip** link.

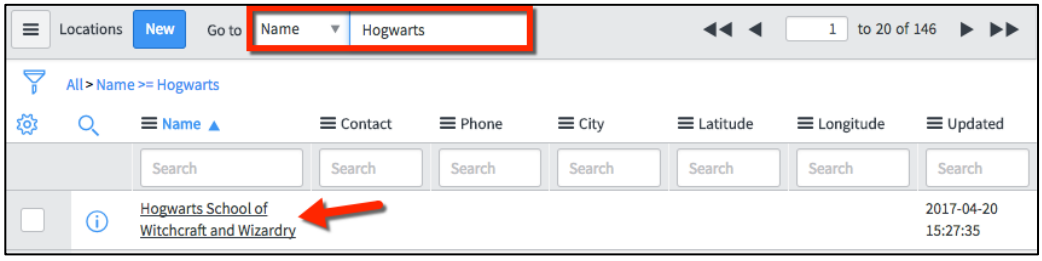


Review Locations

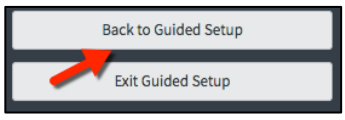
1. Navigate to the **Locations** section and click the **Configure** button.



2. Search for **Hogwarts** and select the record and review.



3. Click the **Back to Guided Setup** button.



4. Click the **Mark as Complete** button for the Locations section.

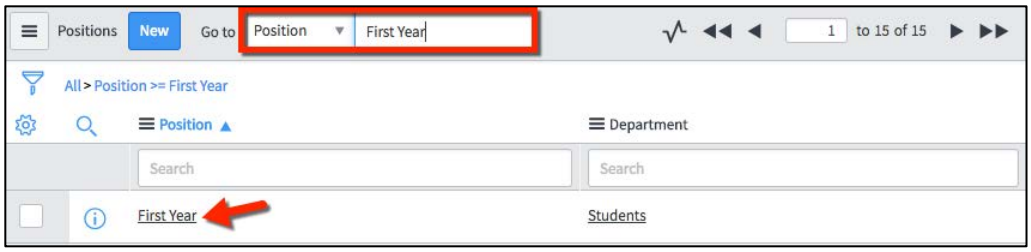


Review Positions

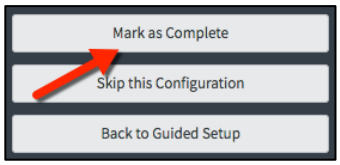
1. Navigate to the **Positions** section and click the **Configure** button.



2. Search for the **First Year** position and review.

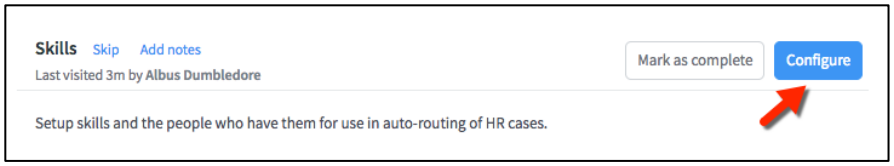


3. Click the **Mark as Complete** button.

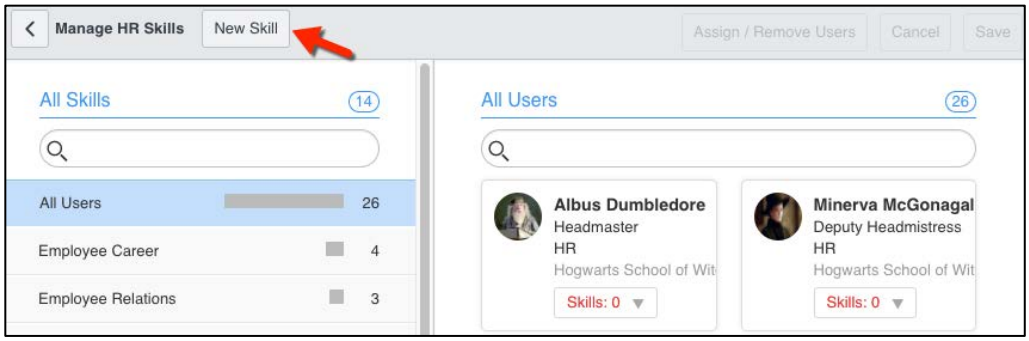


Review and Configure Skills

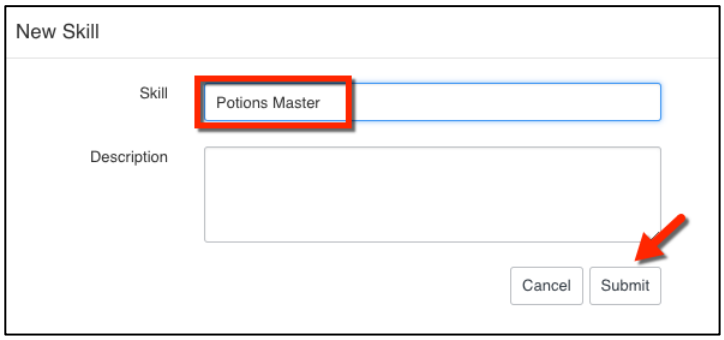
1. Navigate to the **Skills** section and click the **Configure** button.



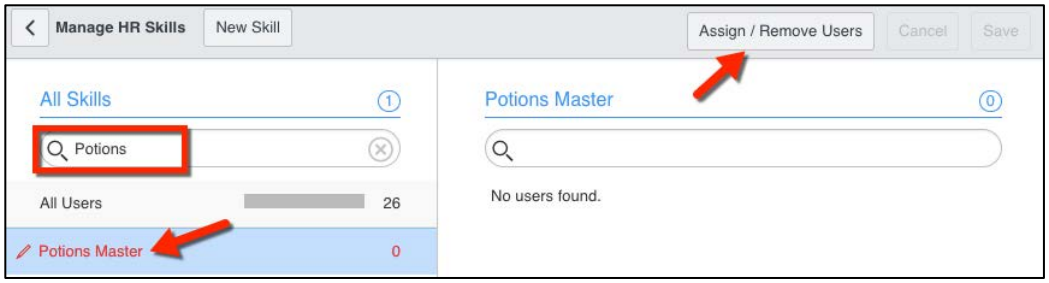
2. Click on the **New Skill** button.



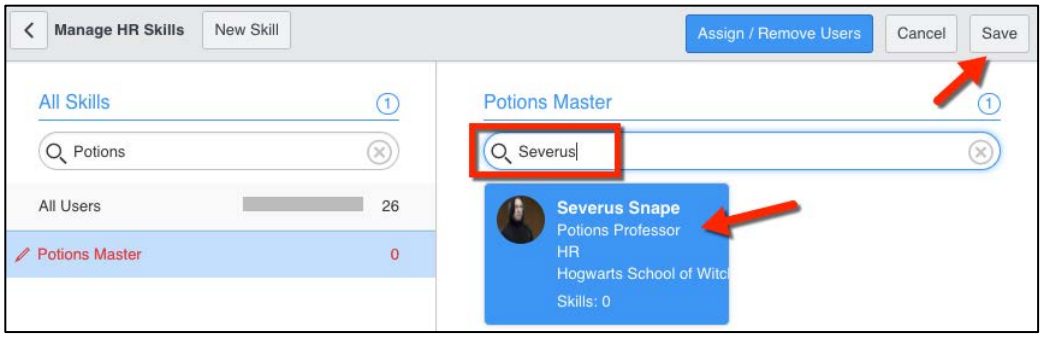
3. Enter the following value, and then click the **Submit** button:
   Name: **Potions Master**



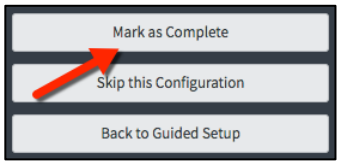
4. Select the **Potions Master** skill and Click the **Assign/Remove Users** button.



5. Select **Severus Snape** and click the **Save** button.

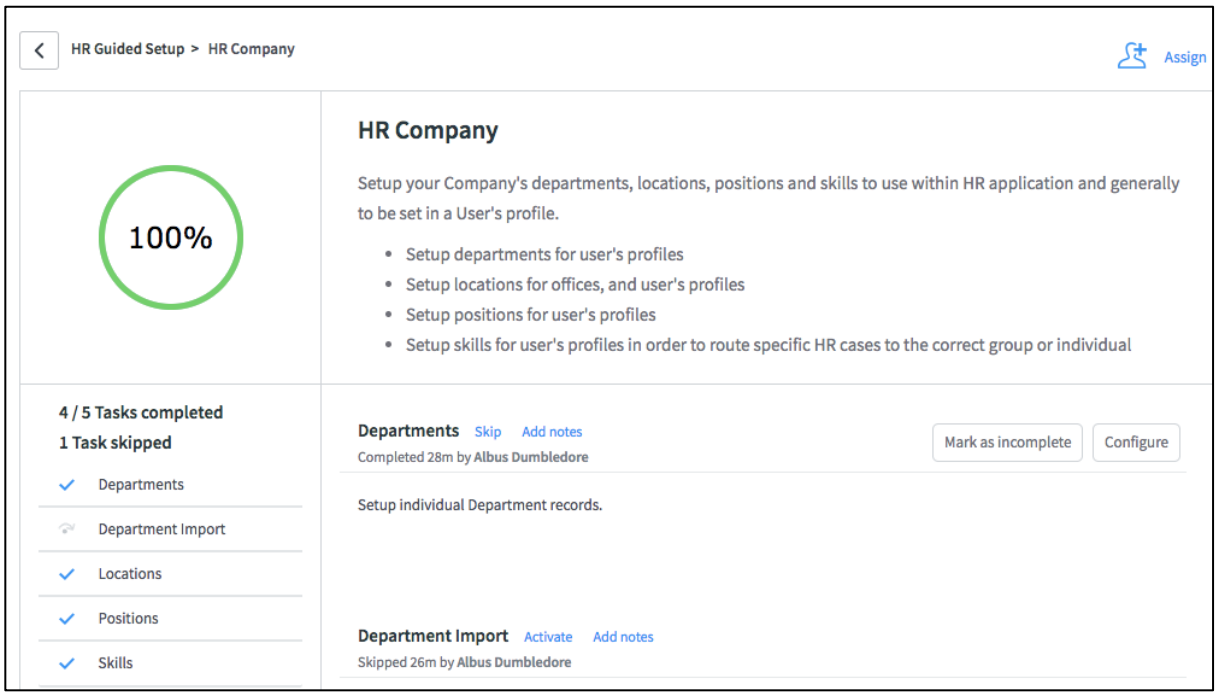


6. Click the **Mark as Complete** button.



Lab Success Verification

1. The **HR Guided Setup** for **HR Company** is 100% complete.



Lab Goal

This lab explains how to set up and configure any knowledge articles pertaining to the new HR Service you are creating.

1. Review and Configure HR Knowledge Bases
2. Review and Configure HR Knowledge Articles
3. Import Knowledge Articles

Lab 3.0
HR Knowledge Management Setup

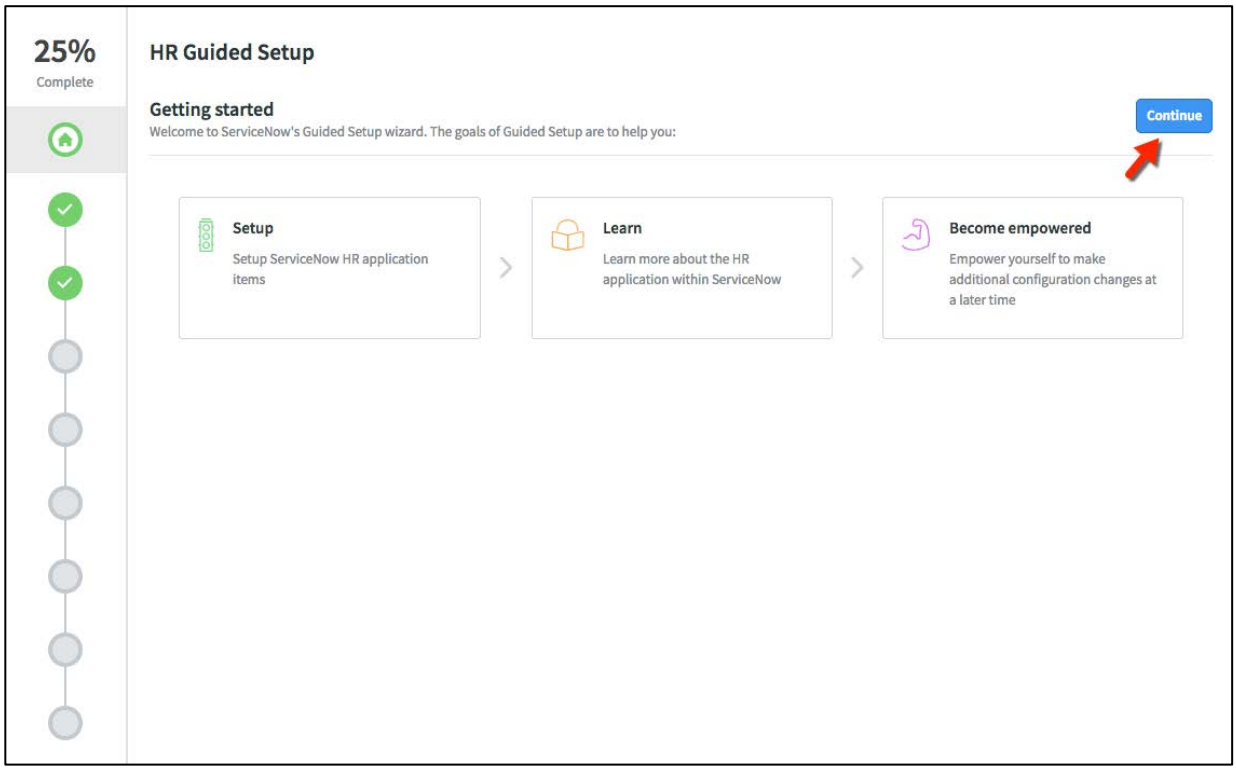
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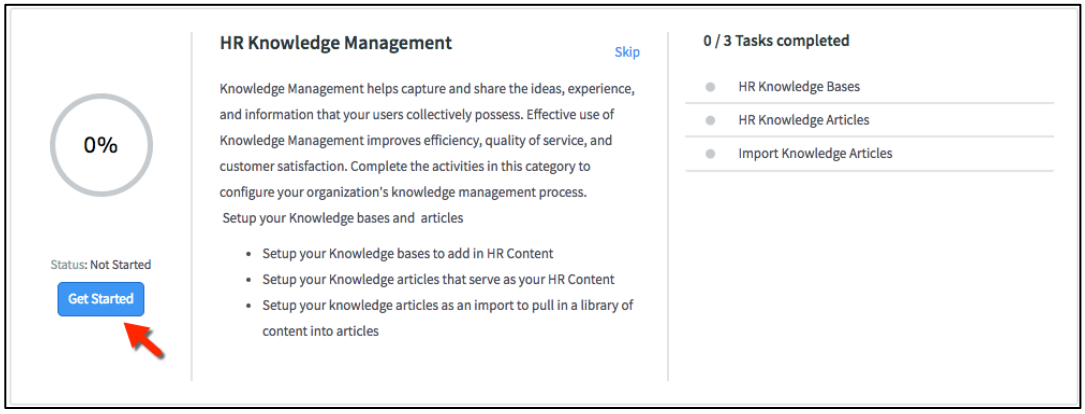


Review and Configure HR Knowledge Bases

1. Navigate to **Guided Setup** and click the **Continue** button.



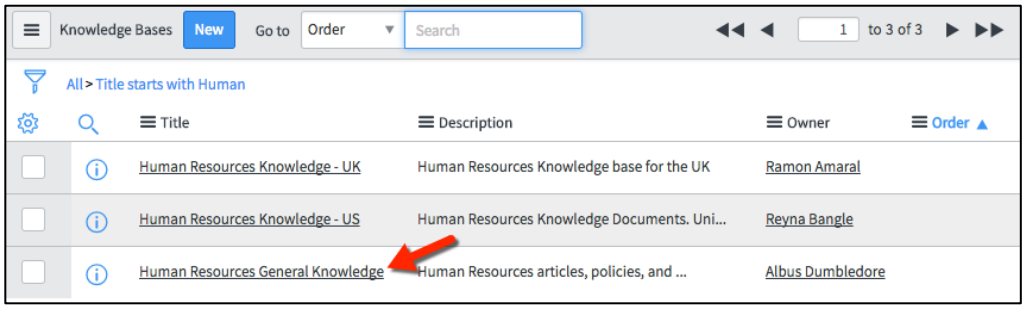
2. Navigate to **HR Knowledge Management** section and click the **Get Started** button.



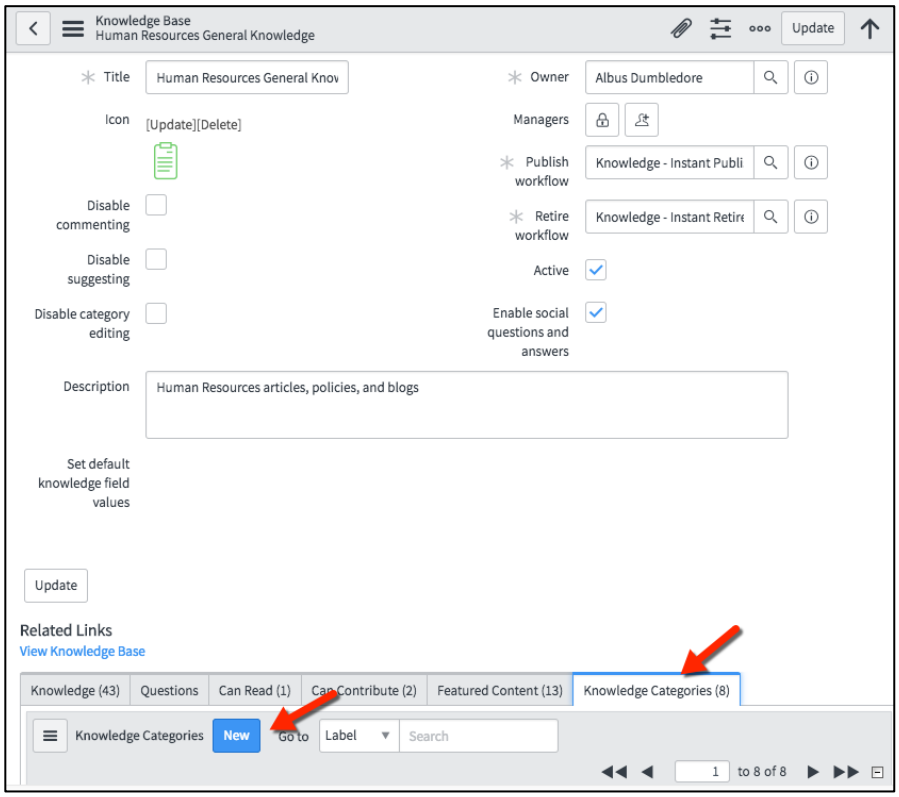
3. Navigate to the **HR Knowledge Bases** section and click the **Configure** button.



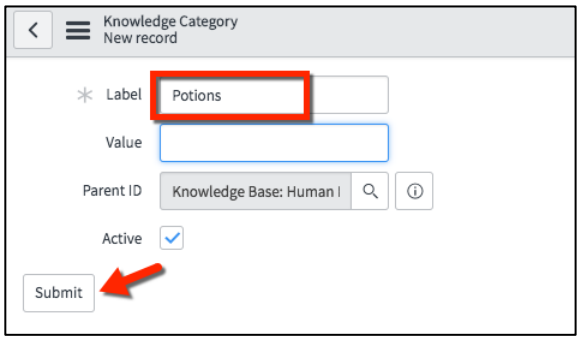
4. Select the **Knowledge Base** called **Human Resources General Knowledge.**



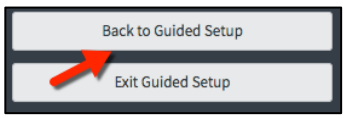
5. Review **Knowledge Base** configuration settings, scroll down and select the **Knowledge Categories** tab and then click on the **New** button.



6. Create a new category called **Potions**, then click on the **Submit** button.



7. Click the **Back to Guided Setup** button.

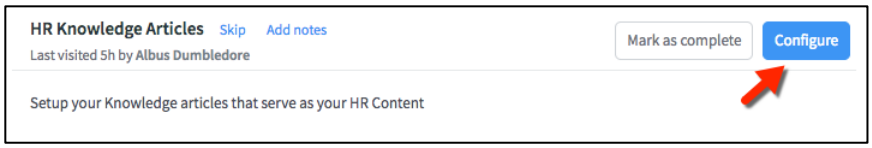


8. Click the **Mark as Complete** button for the **HR Knowledge Bases** section.

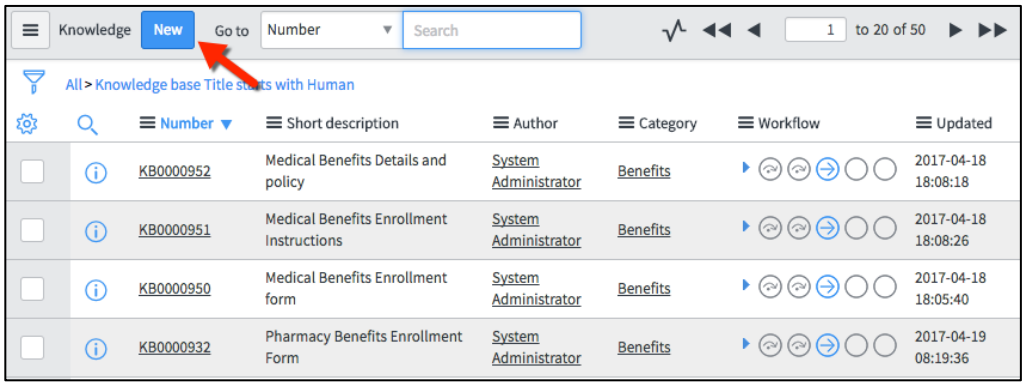


Review and Configure HR Knowledge Articles

1. Navigate to the **HR Knowledge Articles** section and click the **Configure** button.

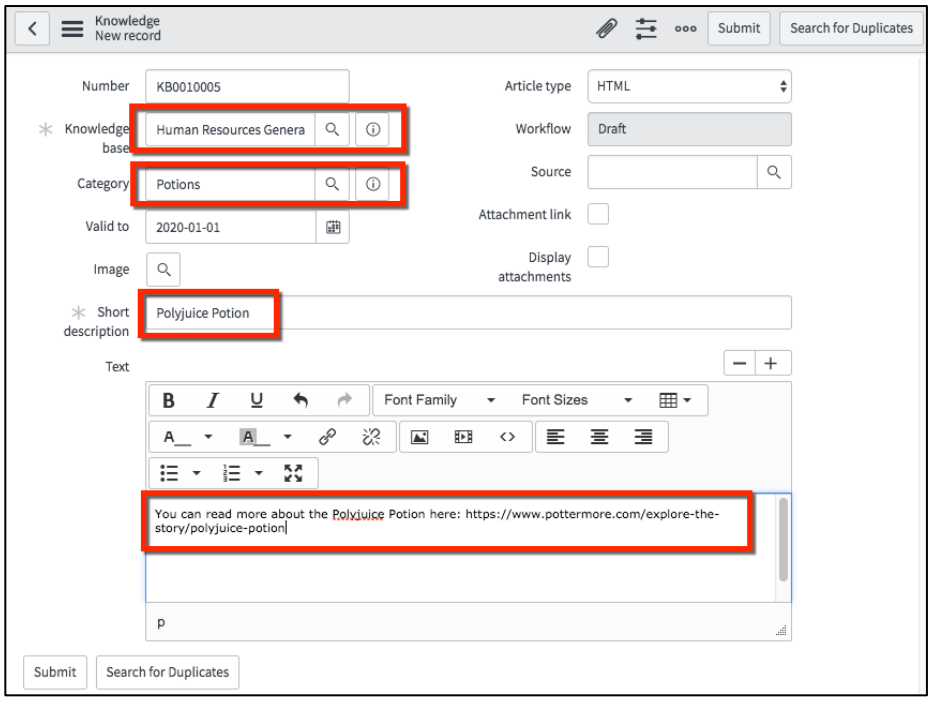


2. Review existing **Knowledge Articles** and click on the **New** button.

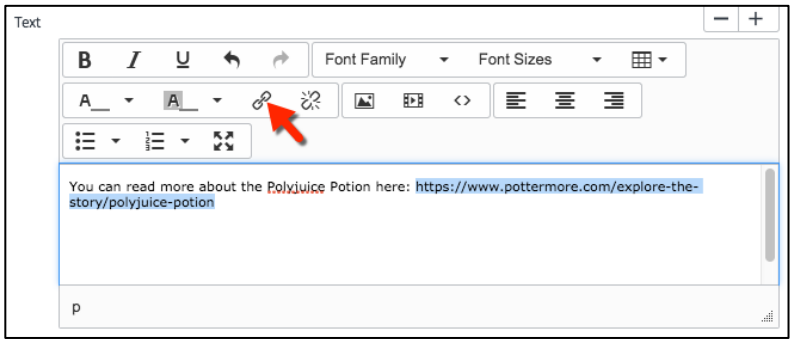


3. Complete the new record form with the following values:

   Knowledge Base: **Human Resources General Knowledge**
   Category: **Potions**
   Short Description: **Polyjuice Potion**
   Text: **You can read more about Polyjuice Potion here: https://www.pottermore.com/explore-the-story/polyjuice-potion**



4. Highlight the website link text and click on the **Insert/Edit Link.**

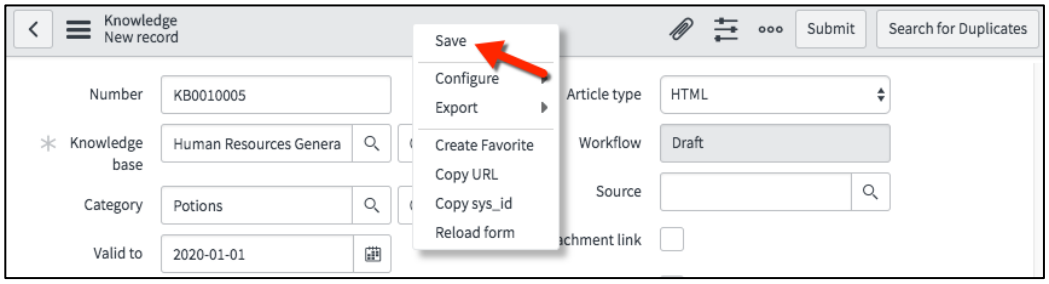


5. Complete form with the following values and then click **Ok.**

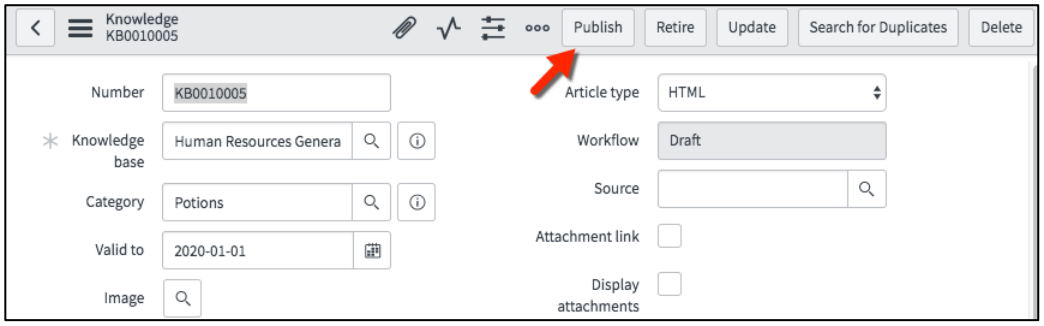
   URL: **https://www.pottermore.com/explore-the-story/polyjuice-potion**
   Text: **https://www.pottermore.com/explore-the-story/polyjuice-potion**
   Target: **New window (_blank)**



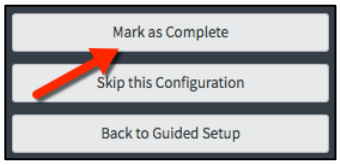
6. Right-click on the header and click **Save.**



7. Click the **Publish** Button.

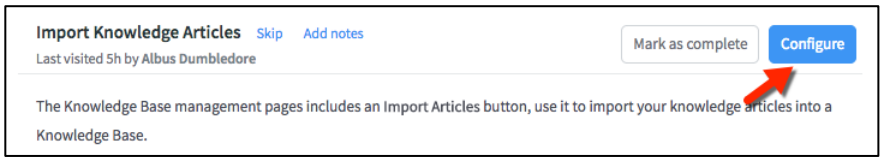


8. Click the **Mark as Complete** button.

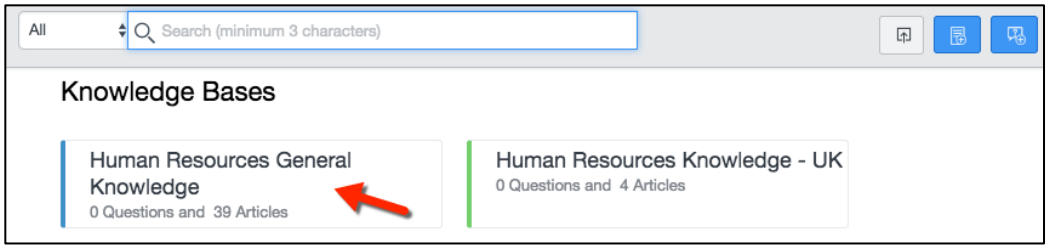


Import Knowledge Articles

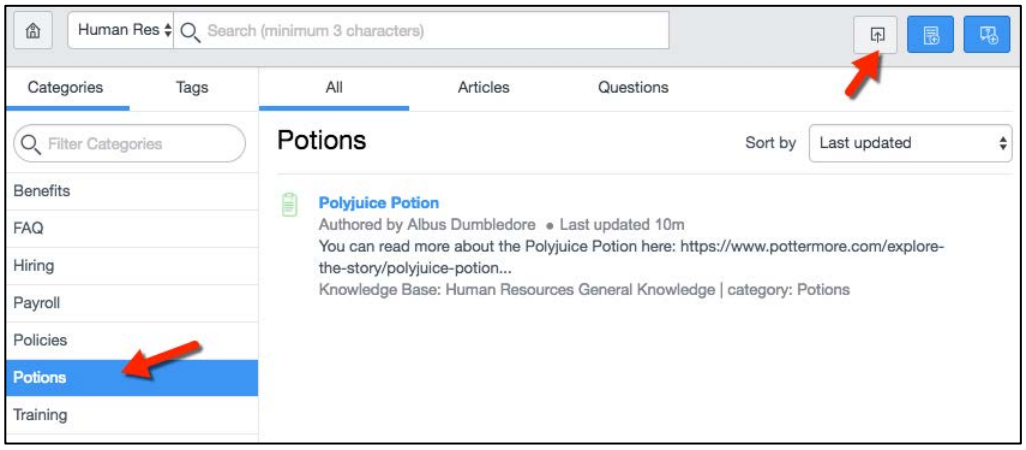
1. Navigate to the **Import Knowledge Articles** section and click the **Configure** button.



2. Select the **Knowledge Base** called **Human Resources General Knowledge**.

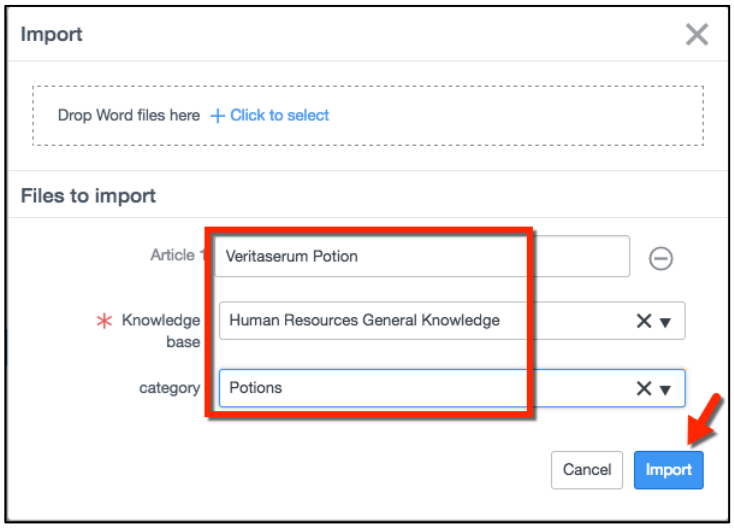


3. Select the **Potions Category** and click the **Import Article** button.

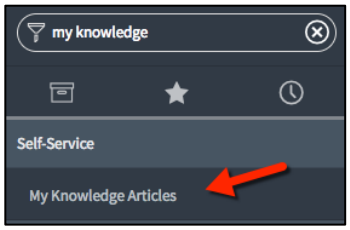


4. Select the lab file called **Veritaserum Potion.docx** and complete the form with the following values, then click the **Import** button:

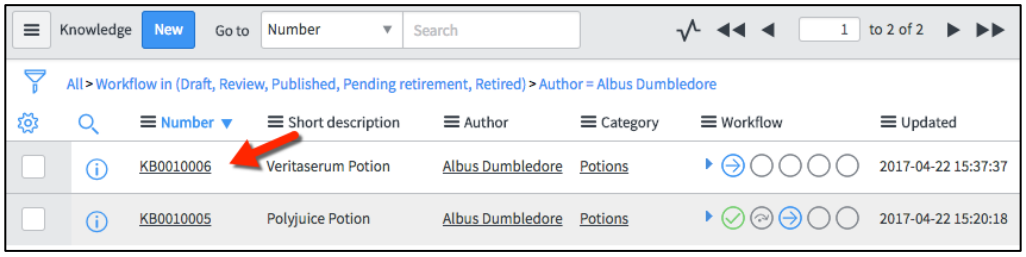
   Knowledge Base: **Human Resources General Knowledge**
   Category: **Potions**



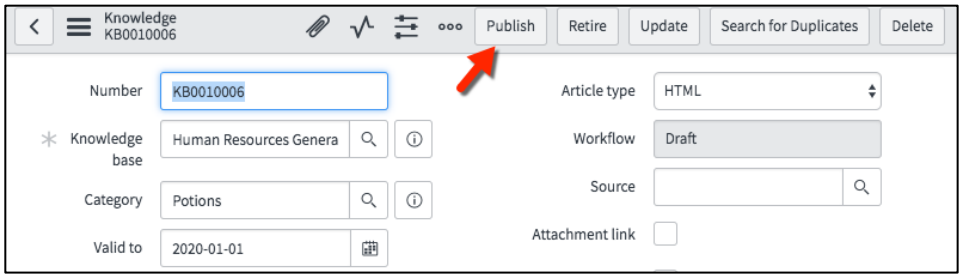
5. Click **My Knowledge Articles** in the **Application Navigator.**



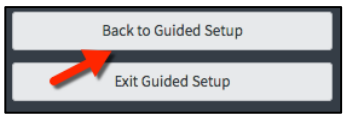
6. Select the **Veritaserum Potion** Knowledge Article.



7. Click the **Publish** button.



8. Click the **Back to Guided Setup** button.

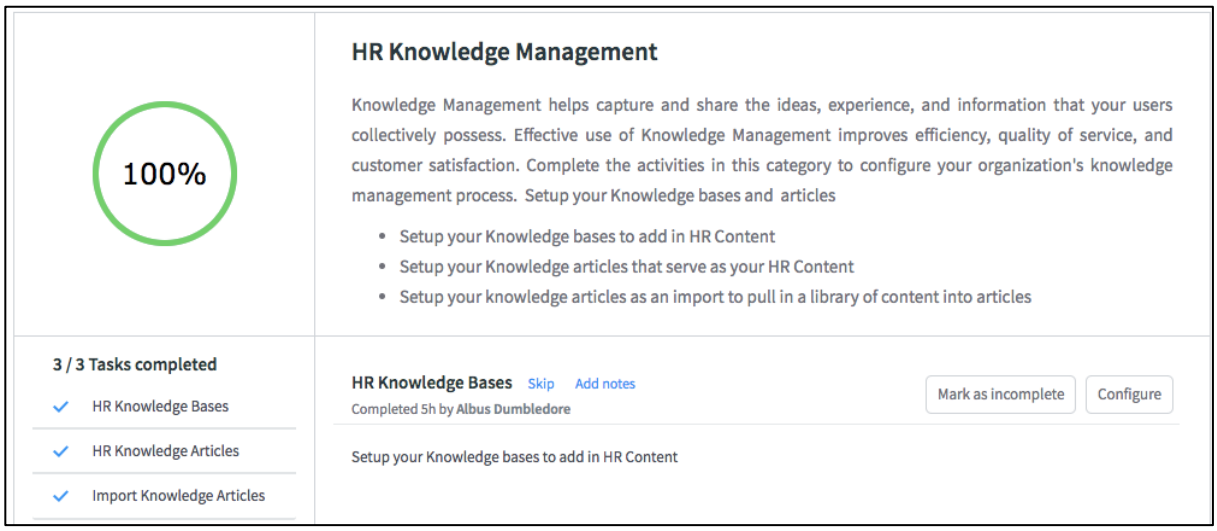


9. Click the **Mark as Complete** button for the **Import Knowledge Articles** Section.



Lab Success Verification

1. The **HR Guided Setup** for **HR Knowledge Management** is 100% complete.



Lab Goal

This lab explains how to set up and configure a new HR service catalog item. This includes defining questions, associating knowledge, and configuring categories.

1. Configure HR Service Catalog Categories
2. Configure HR Service Catalog Items
3. Configure HR Catalog to KB Link

Lab 4.0
HR Service Catalog Setup

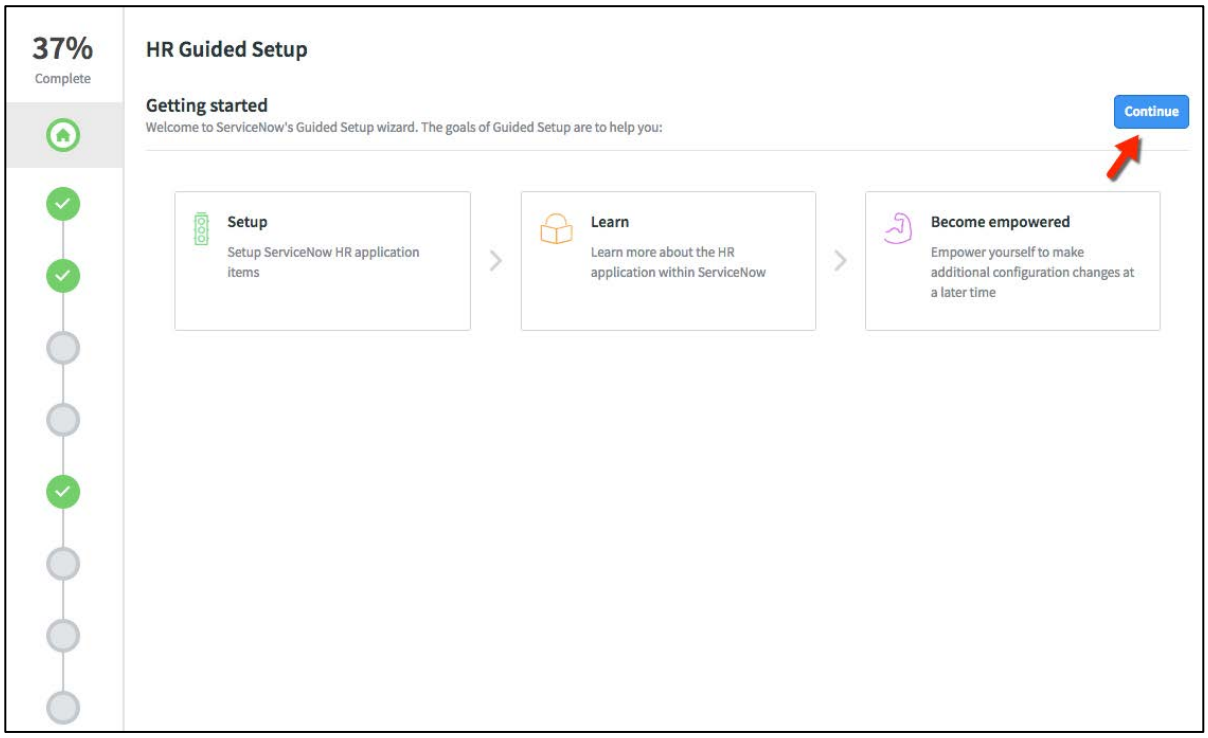
Log onto Your Training ServiceNow Instance

1. Navigate to the unique instance URL provided to you and log on as the **hradmin** user.

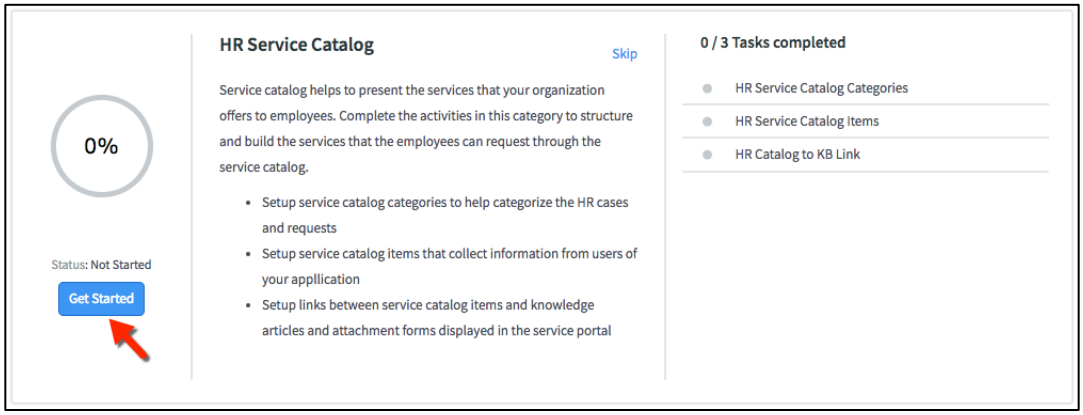


Configure HR Service Catalog Categories

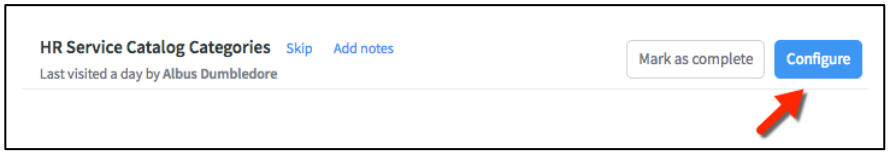
1. Navigate to **Guided Setup** and click the **Continue** button.



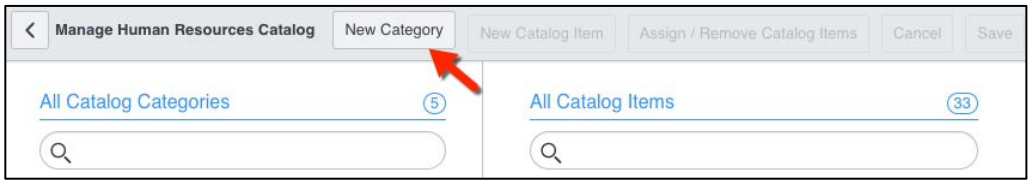
2. Navigate to **HR Service Catalog** section and click the **Get Started** button.



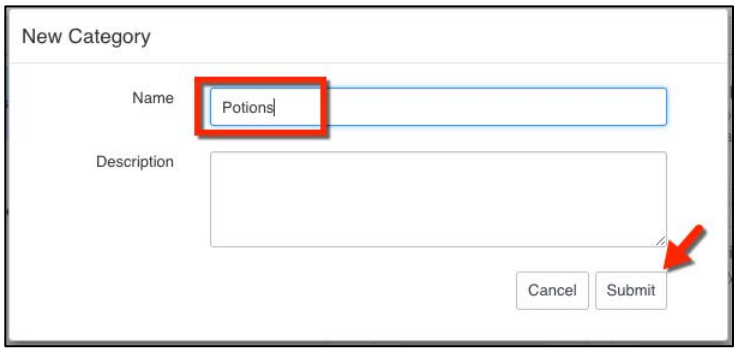
3. Navigate to the **HR Service Catalog Categories** section and click **Configure** button.



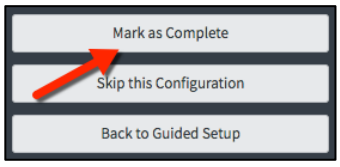
4. Click the **New Category** Button.



5. Enter the name **Potions** and click **Submit**.



6. Click the **Mark as Complete** button.

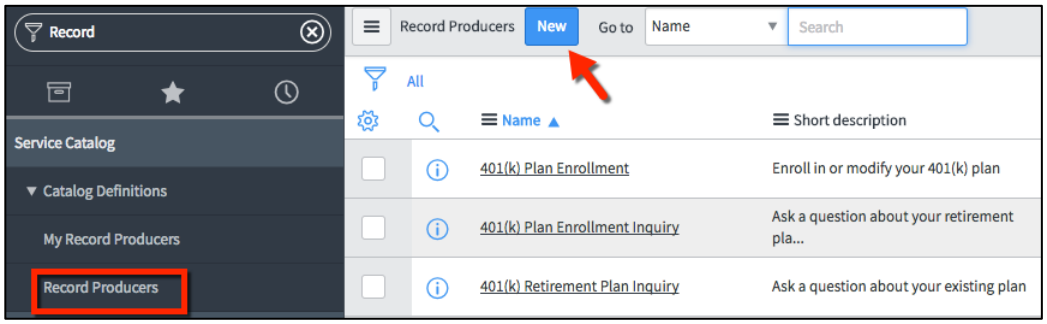


Configure HR Service Catalog Items

1. Navigate to the **HR Service Catalog Items** section and click **Configure** button.

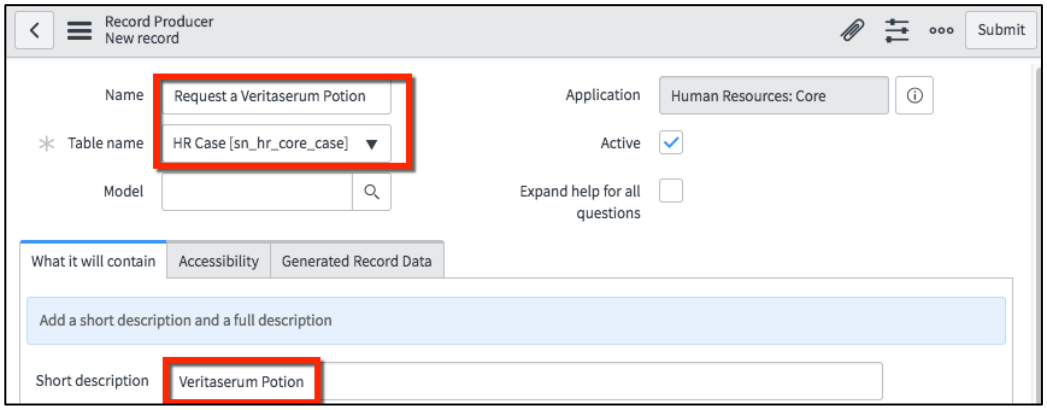


2. Select **Record Producers** from the **Application Navigator** and click **New**.



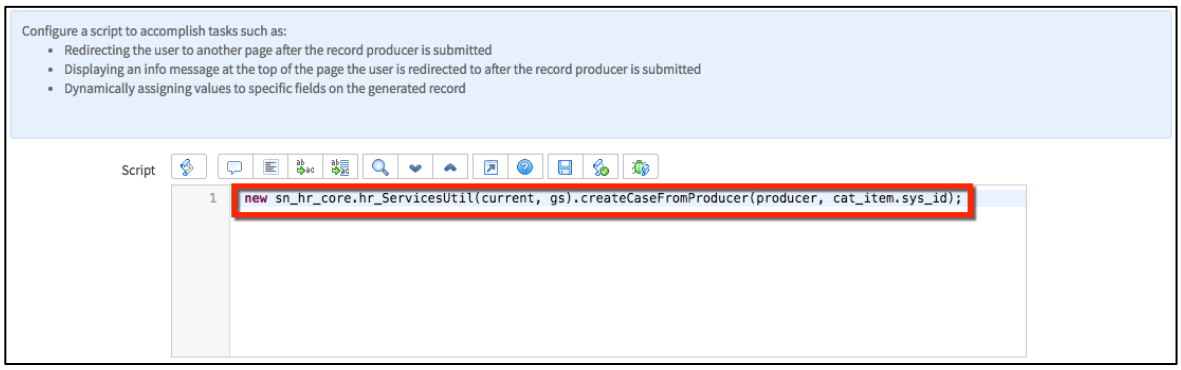
3. Enter the following values in the form:

   Name: **Request a Veritaserum Potion**
   Table name: **HR Case [sn_hr_core_case]**
   Short Description: **Veritaserum Potion**

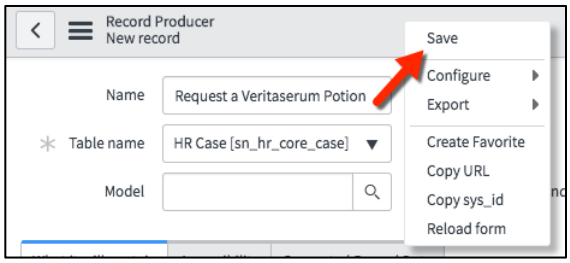


4. Scroll down to the **Script** section and insert the following:

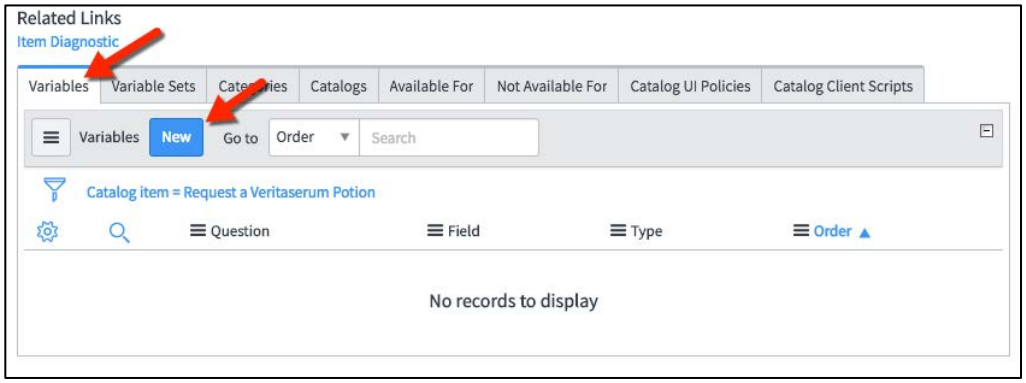
   Script: **new sn_hr_core.hr_ServicesUtil(current, gs).createCaseFromProducer(producer, cat_item.sys_id);**



5. Right-click header and select **Save.**

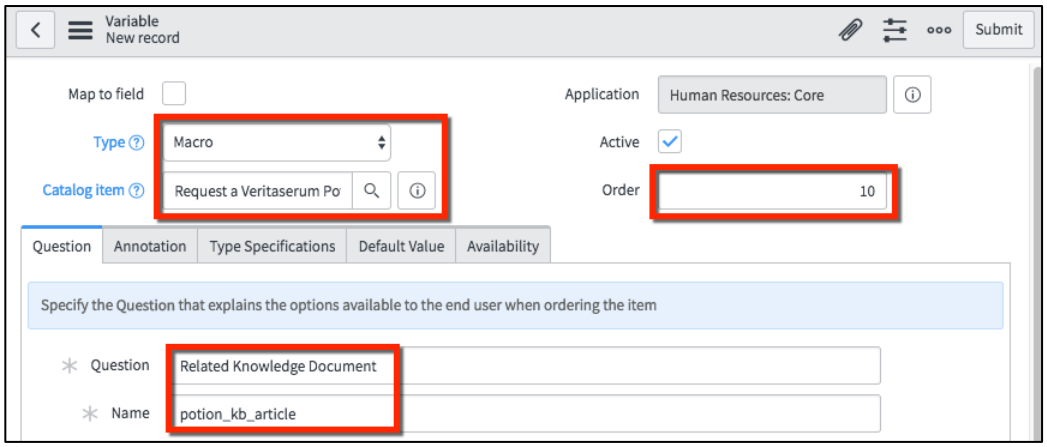


6. Scroll down and select **Variables** tab and click **New.**

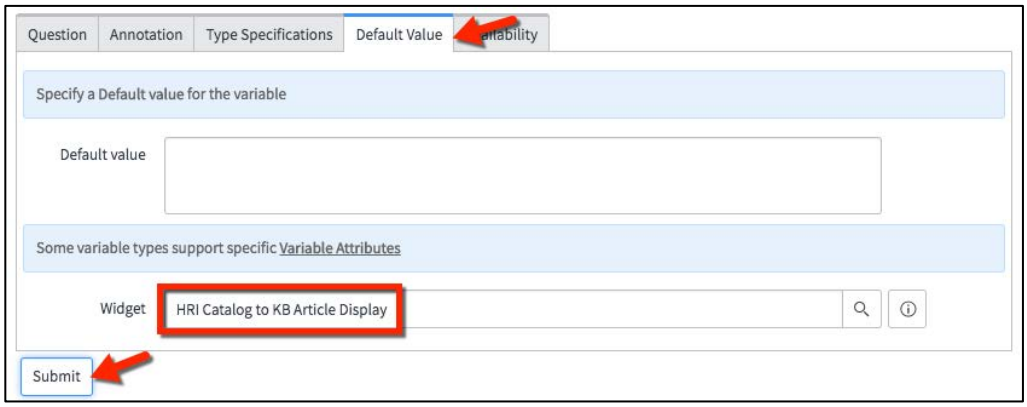


7. Complete the following form values:

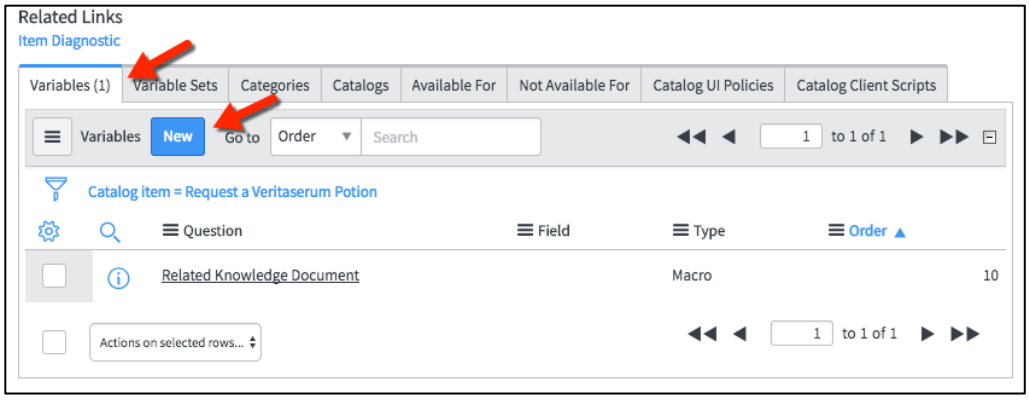
   Type: **Macro**
   Catalog item: **Request a Veritaserum Potion**
   Order: **10**
   Question: **Related Knowledge Document**
   Name: **potion_kb_article**



8. Select the **Default Value** tab, and select **HRI Catalog to KB Article Display** in the **Widget** box, click **Submit.**

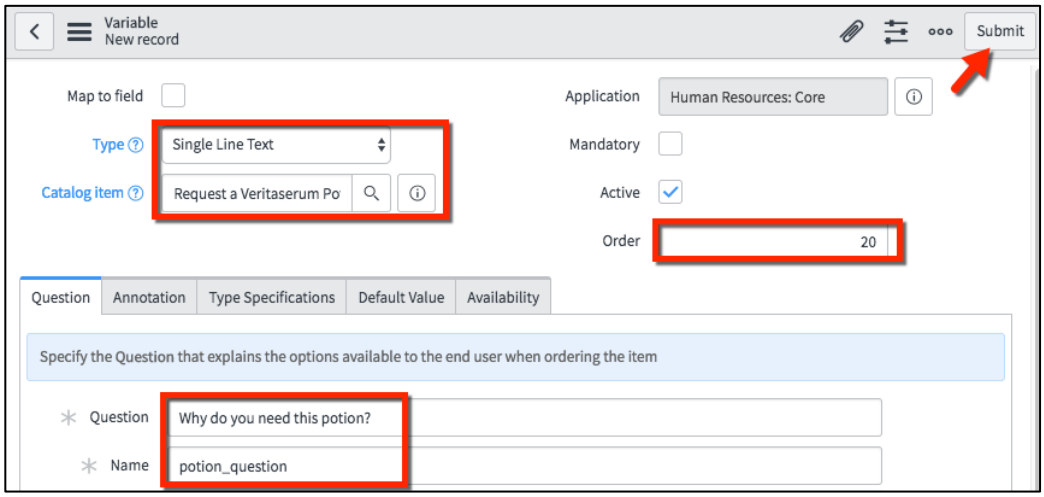


9. Select **Variables** tab and click **New.**

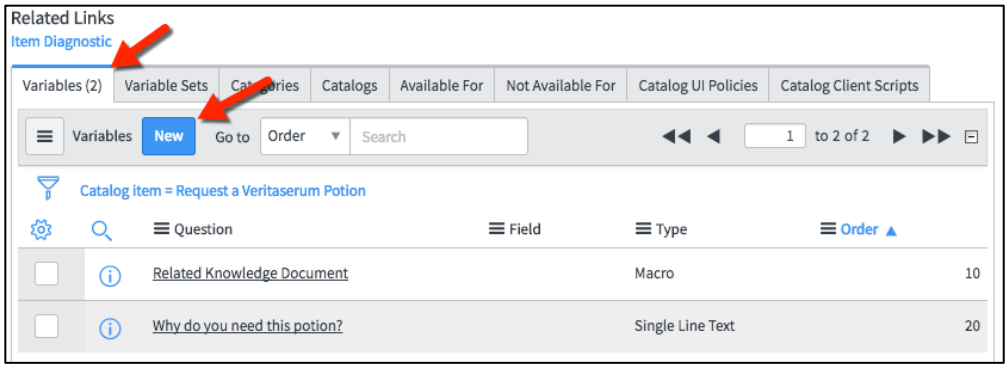


10. Complete the following form values and then click **Submit**:

    Type: **Single Line Text**
    Catalog Item: **Request a Veritaserum Potion**
    Order: **20**
    Question: **Why do you need this potion?**
    Name: **potion_question**

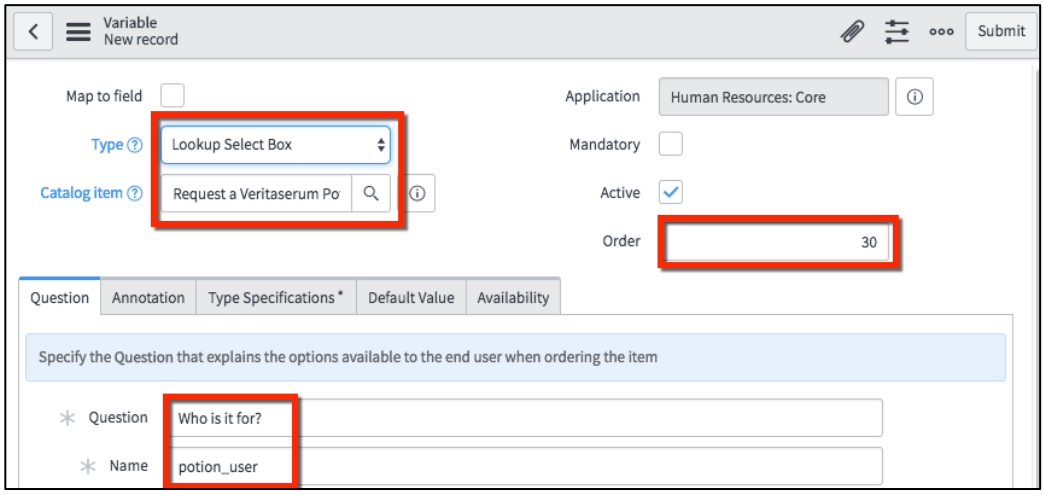


11. Select **Variables** tab and click **New.**



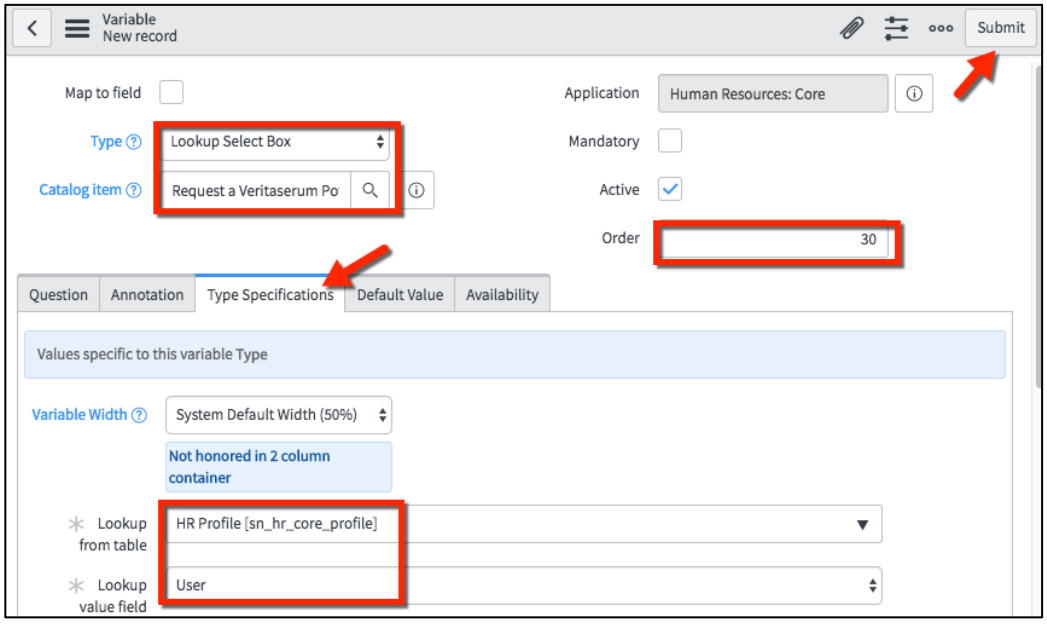
12. Complete the following form values:

Type: **Lookup Select Box**
Catalog Item: **Request a Veritaserum Potion**
Order: **30**
Question: **Who is it for?**
Name: **potion_user**

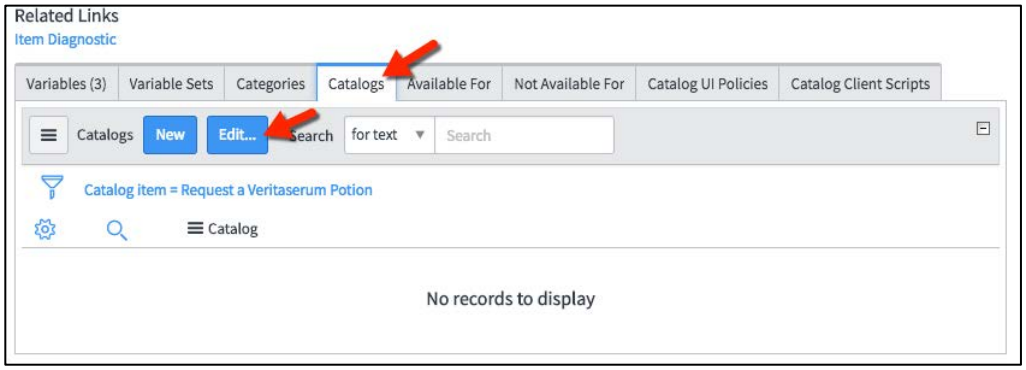


13. Select the **Type Specifications** tab and select the following form values and then click **Submit**:

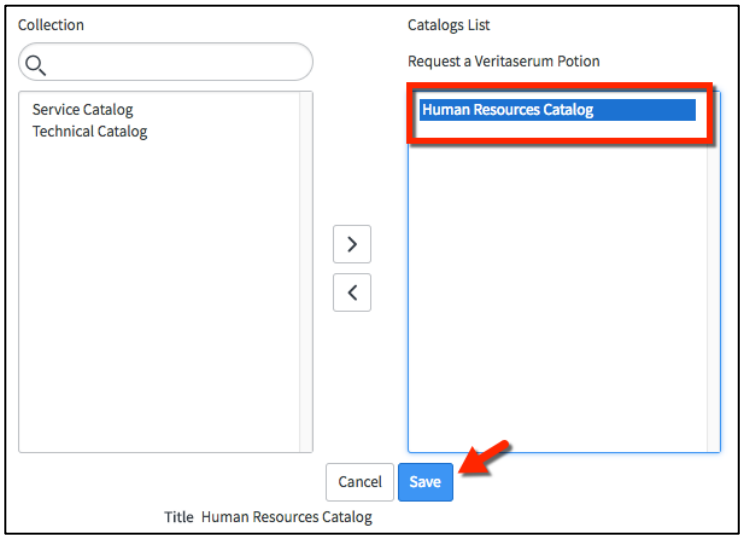
    Lookup from table: **HR Profile [sn_hr_core_profile]**
    Lookup value field: **User**



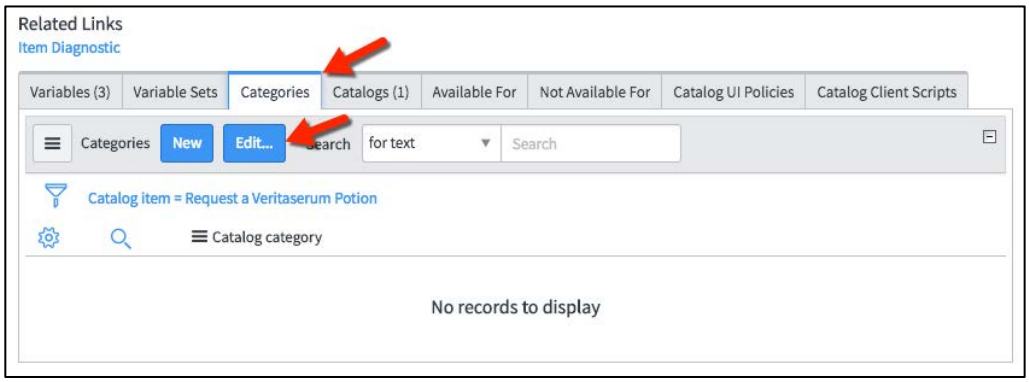
14. Select the **Catalogs** tab and select **Edit.**



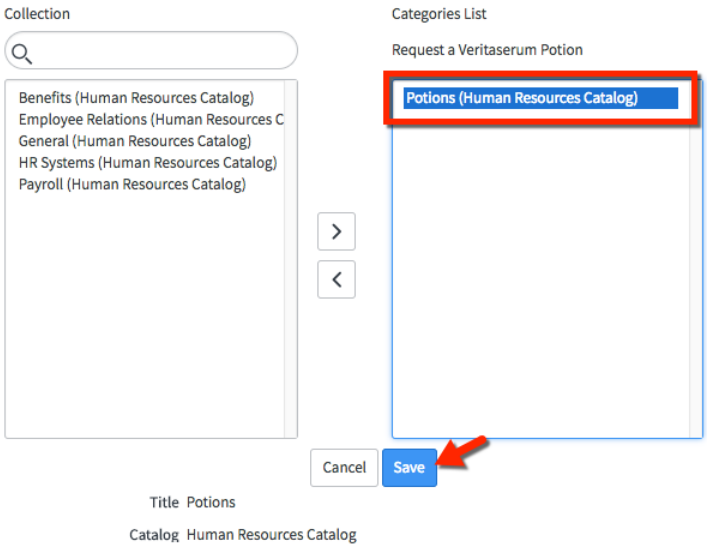
15. Select **Human Resources Catalog** and click **Save.**



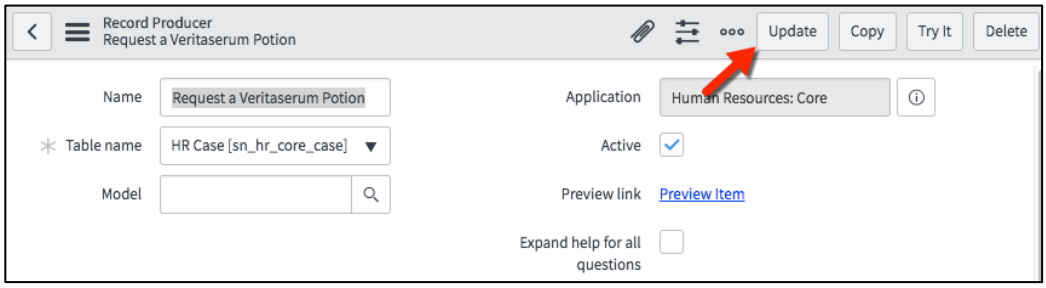
16. Select **Categories** tab and select **Edit.**



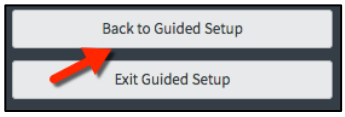
17. Select **Potions** and click **Save.**



18. Click **Update.**



19. Click the **Back to Guided Setup** button.



20. Click the **Mark as Complete** button for the **HR Service Catalog Items** section.

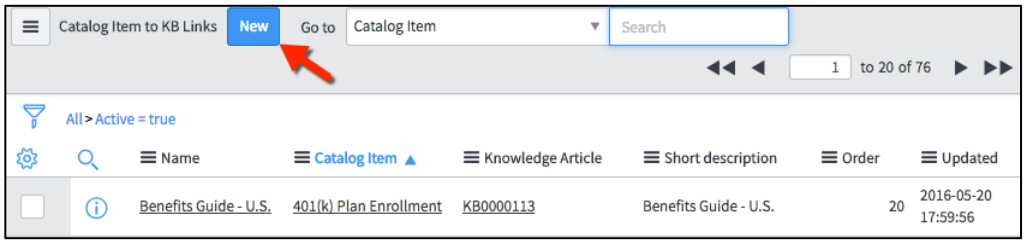


Configure HR Catalog to KB Link

1. Navigate to the **HR Catalog to KB Link** section and click **Configure** button.

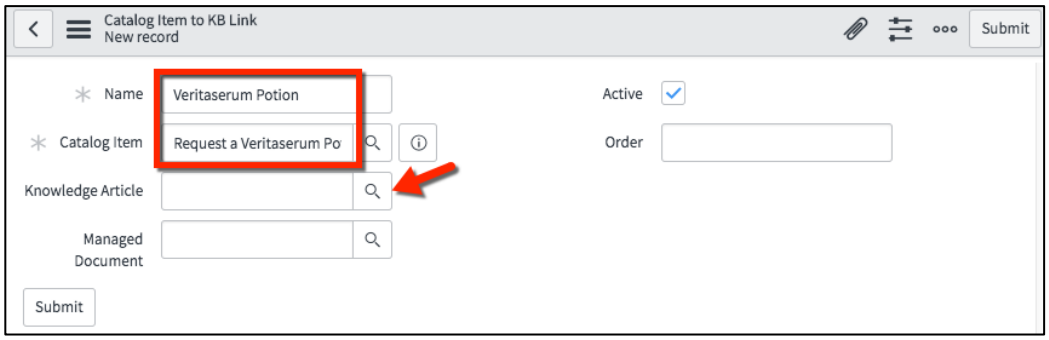


2. Click the **New** button.

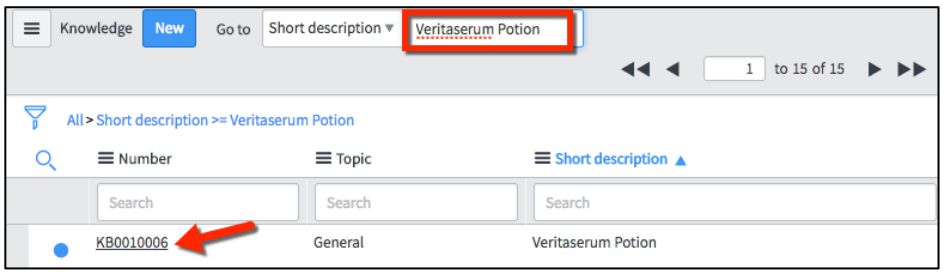


3. Enter the following values in the form then click the **Knowledge Article** search icon:

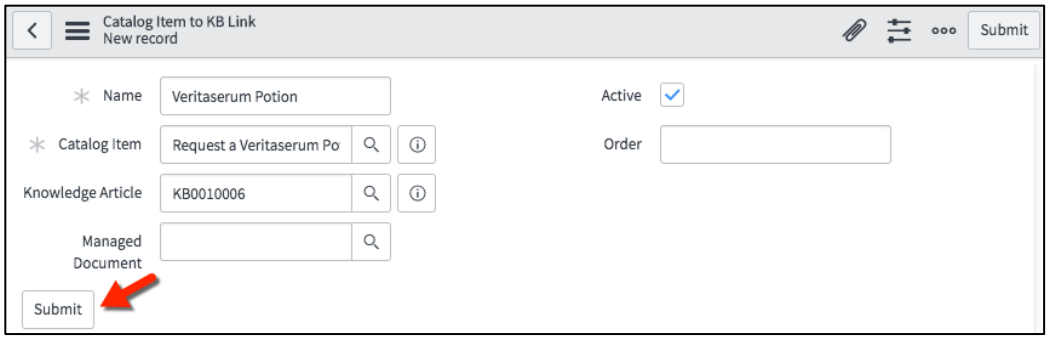
   Name: **Veritaserum**
   Catalog Item: **Request a Veritaserum Potion**



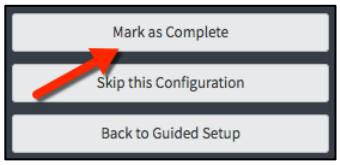
4. Search for Short Description: **Veritaserum Potion** and then select the article.



5. Click the **Submit** button.

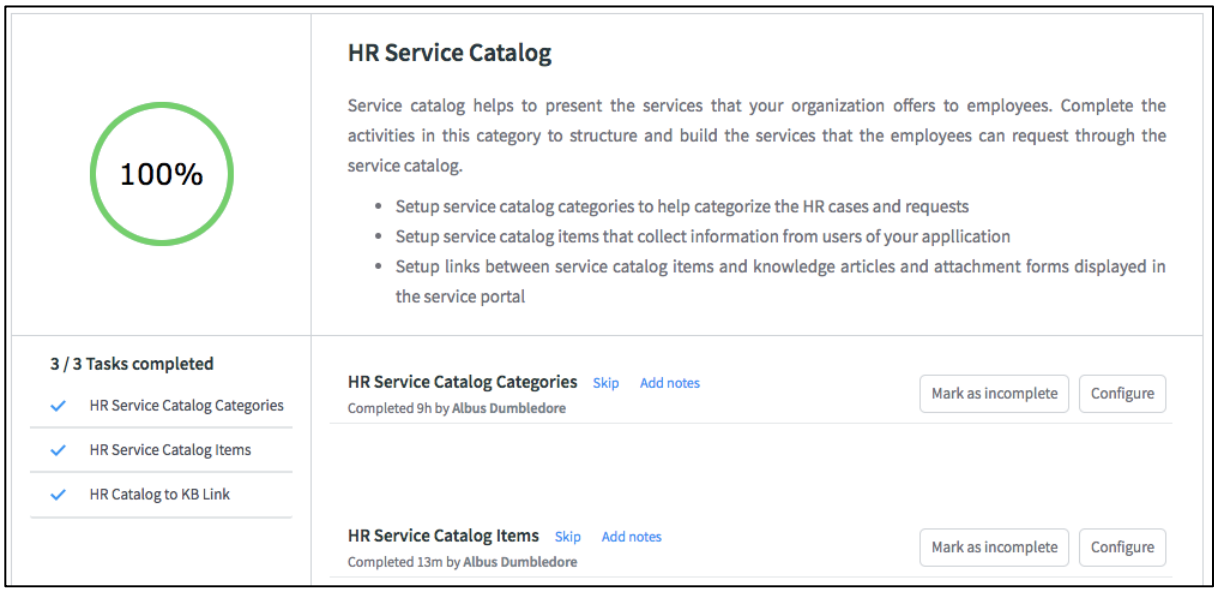


6. Click the **Mark as Complete** button.



Lab Success Verification

1. The **HR Guided Setup** for **HR Service Catalog** is 100% complete.



Lab Goal

This lab explains how to configure your new HR service and configure the associated HR Template.

1. Review HR Service Options
2. Configure HR Topic Category
3. Configure HR Topic Details
4. Configure HR Template
5. Configure HR Service

Lab 5.0
HR Service Configuration Setup

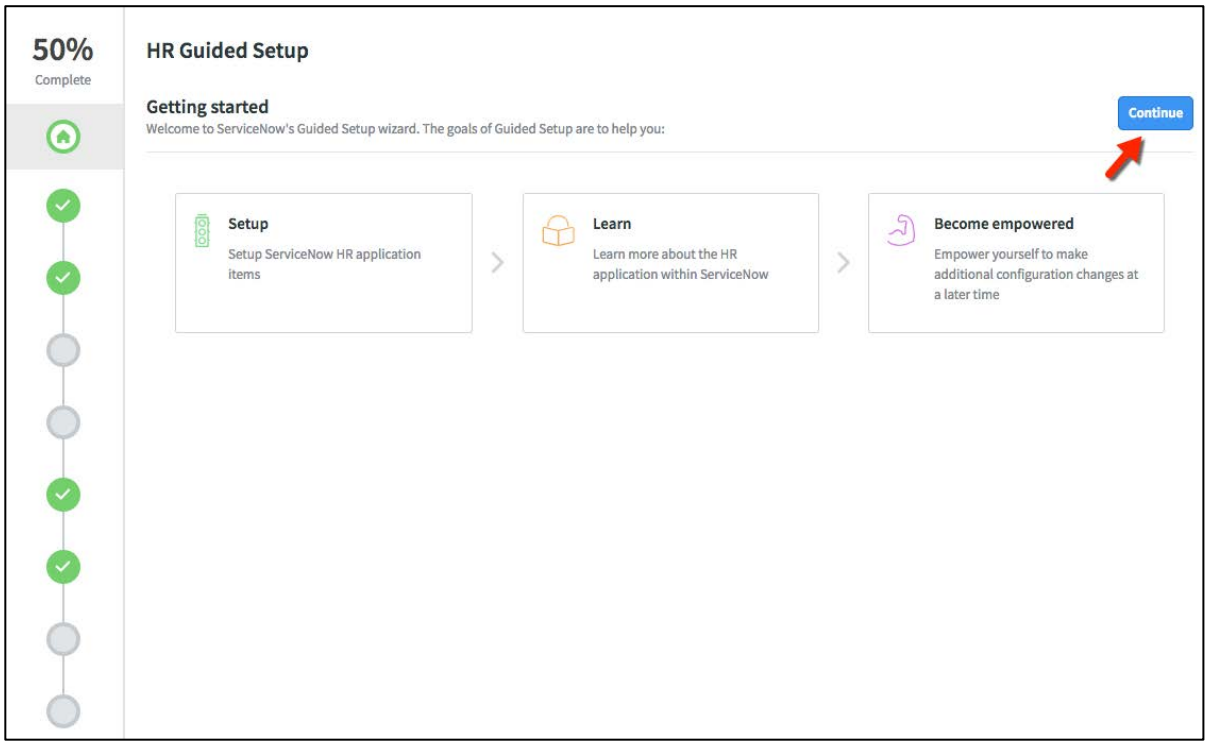
Log onto Your Training ServiceNow Instance

1. Navigate to the unique instance URL provided to you and log on as the **hradmin** user.

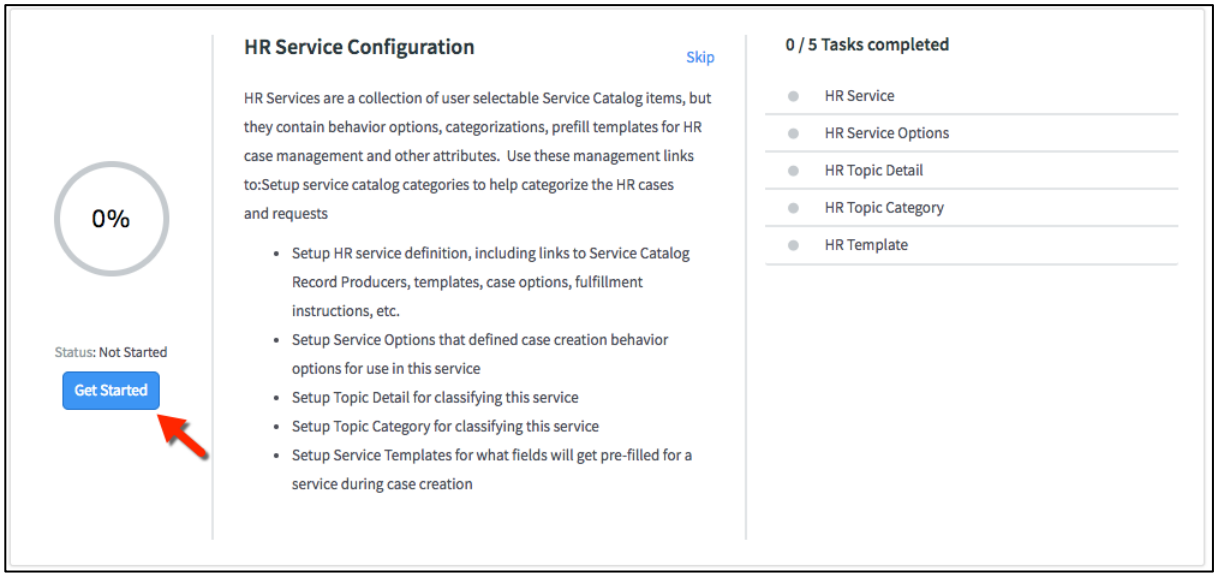


Review HR Service Options

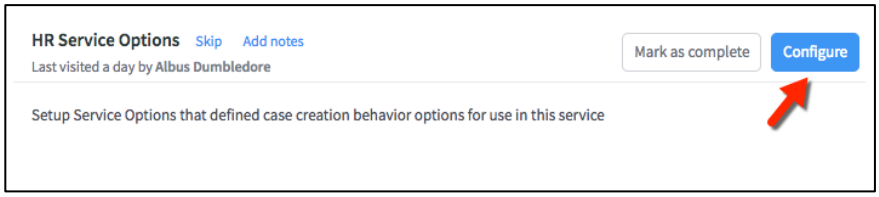
1. Navigate to **Guided Setup** and click the **Continue** button.



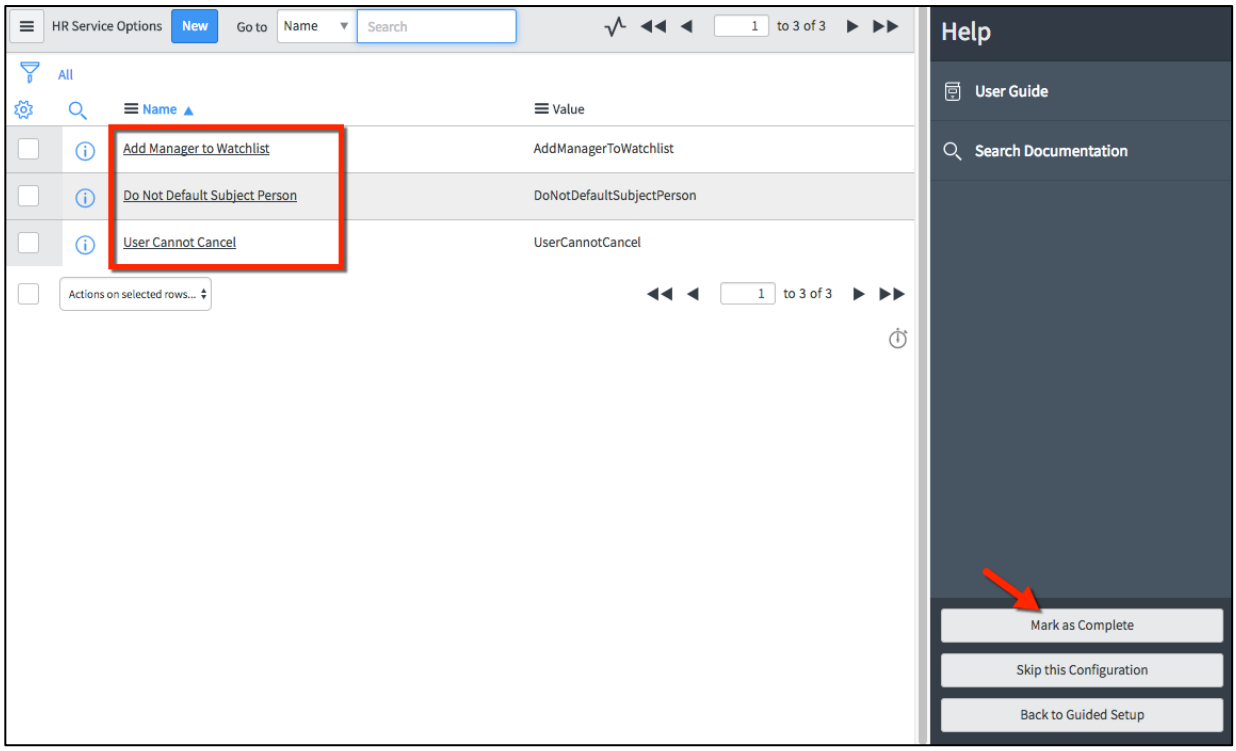
2. Navigate to **HR Service Configuration** section and click the **Get Started** button.



3. Navigate to the **HR Service Options** section and click **Configure** button.



4. Review existing **HR Service Options** and then click the **Mark as Complete** button.

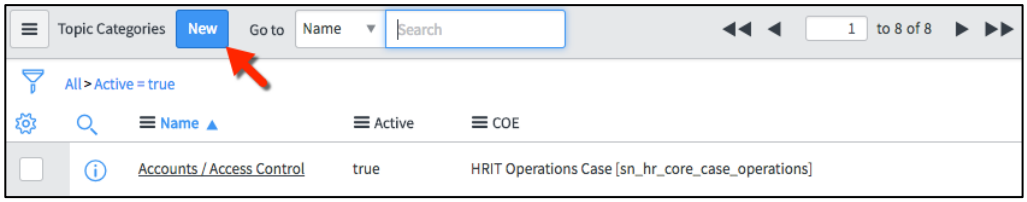


Configure HR Topic Category

1. Navigate to the **HR Topic Category** section and click **Configure** button.

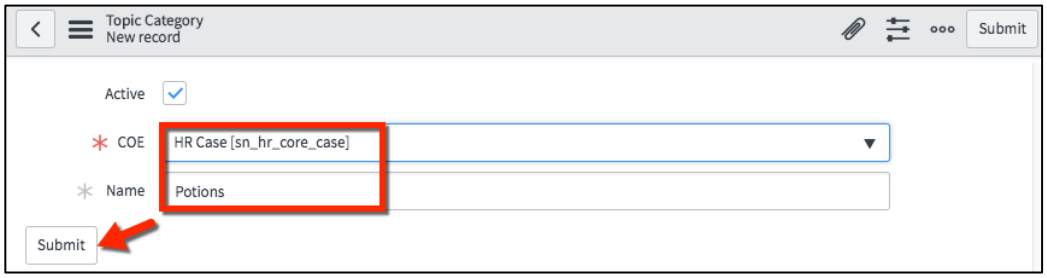


2. Click the **New** button.

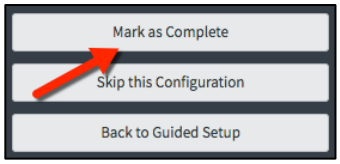


3. Enter the following form vales and then click the **Submit**:

   COE: **HR Case [sn_hr_core_case]**
   Name: **Potions**



4. Click the **Mark as Complete** button.

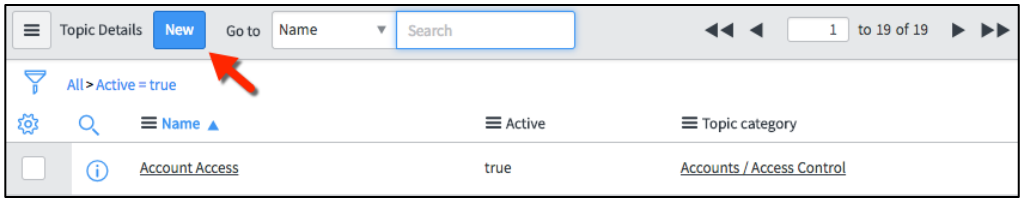


Configure HR Topic Details

1. Navigate to the **HR Topic Detail** section and click **Configure** button.

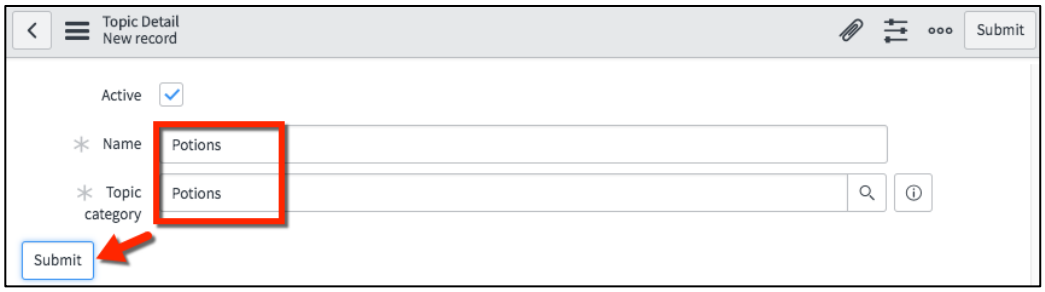


2. Click the **New** button.

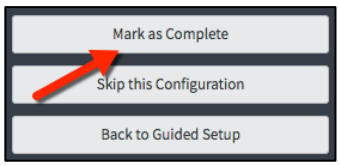


3. Enter the following values and then click **Submit**:

   Name: **Potions**
   Topic Category: **Potions**

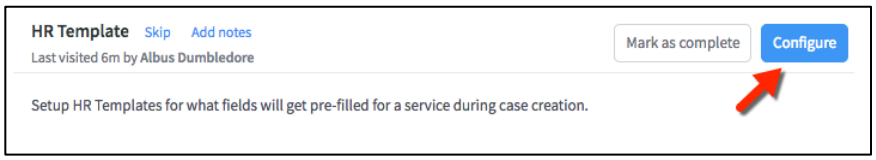


4. Click the **Mark as Complete** button.

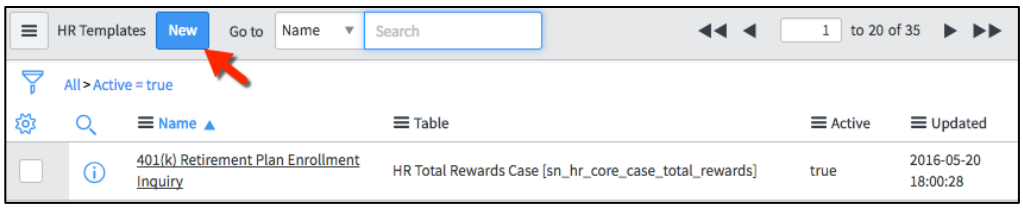


Configure HR Template

1. Navigate to the **HR Template** section and click **Configure** button.

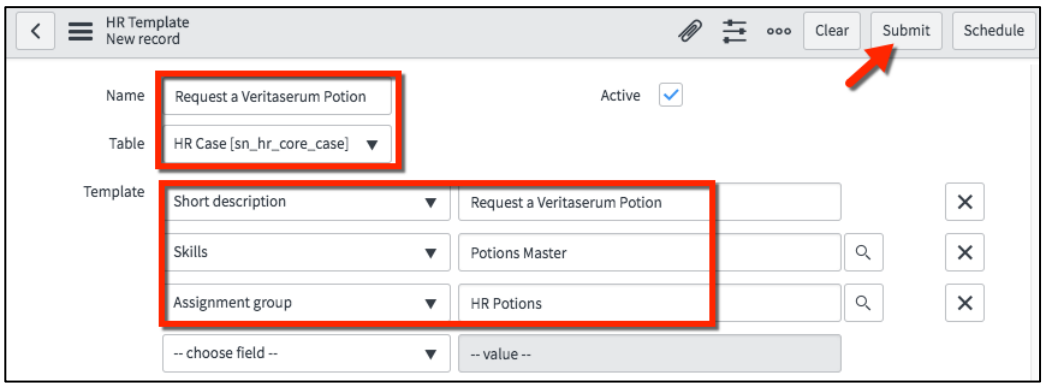


2. Click the **New** button.

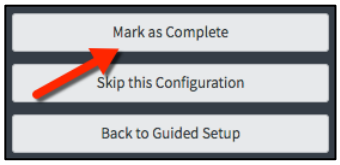


3. Enter the following values and then click **Submit**:

   Name: **Request a Veritaserum Potion**
   Table: **HR Case [sn_hr_core_case]**
   Template > Short Description: **Request a Veritaserum Potion**
   Template > Skills: **Potions Master**
   Template > Assignment group: **HR Potions**

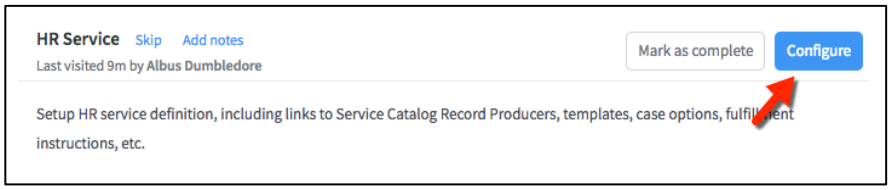


4. Click the **Mark as Complete** button.

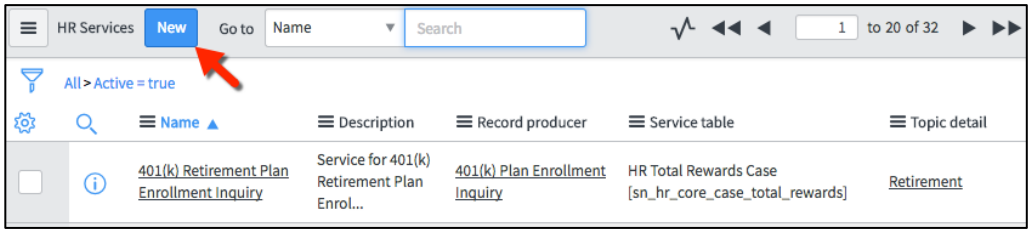


Configure HR Service

1. Navigate to the **HR Service** section and click **Configure** button.

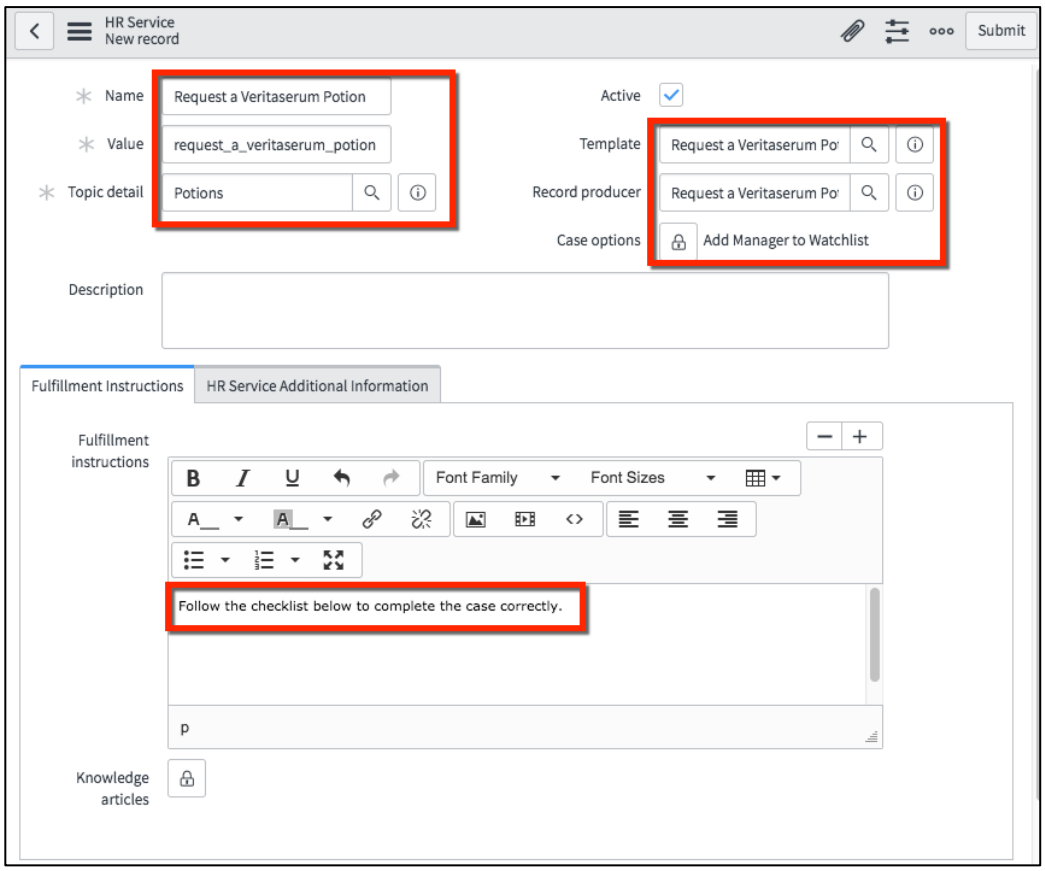


2. Click the **New** button.

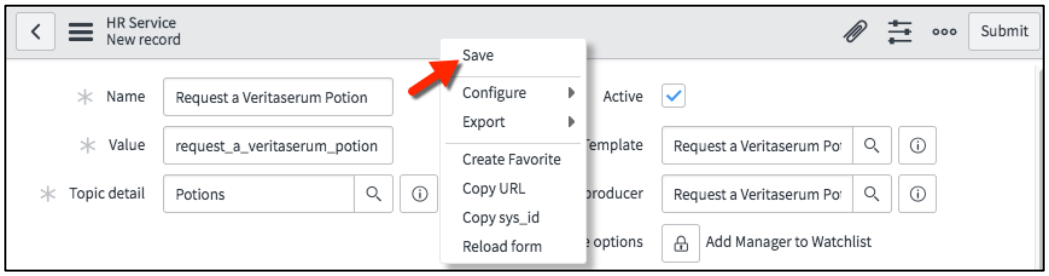


3. Enter the following values:

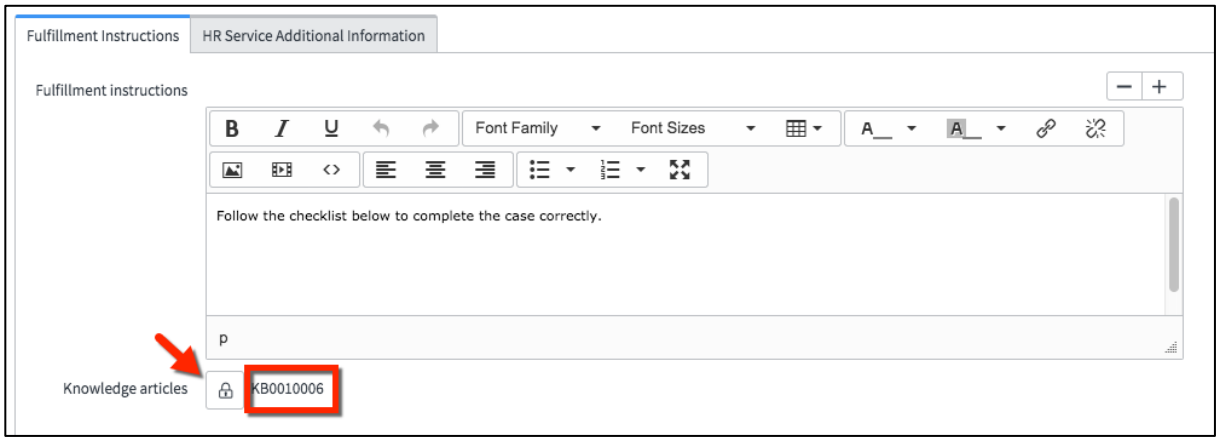
   Name: **Request a Veritaserum Potion**
   Topic detail: **Potions**
   Template: **Request a Veritaserum Potion**
   Record Producer: **Request a Veritaserum Potion**
   Case Options: **Add Manager to Watchlist**
   Fulfillment instructions: **Follow the checklist below to complete the case correctly.**



4. Right-click header and select **Save.**



5. Click the padlock icon and attach the **Veritaserum Potion** Knowledge Article.

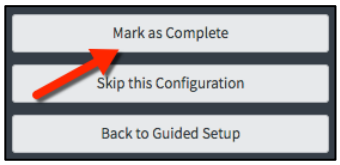


6. Add **Checklist items** with the following values and click the **Update** button:

    1. Review the case description
    2. Click 'Start Work'
    3. Review the knowledge article
    4. Produce the potion
    5. Click 'Close Complete'

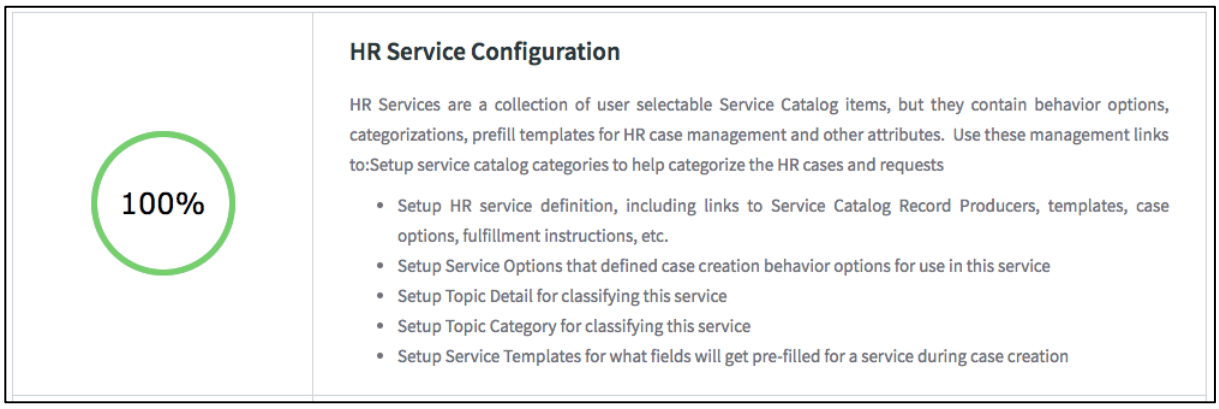


7. Click the **Mark as Complete** button.



Lab Success Verification

1. The **HR Guided Setup** for **HR Service Configuration** is 100% complete.



Lab Goal

This lab reviews the remaining sections of the Guided Setup which we have not needed to configure for this lab.

1. HR Chat and Email Configuration
2. HR Application Configuration
3. HR Service Definitions

Lab 6.0
Review
Guided Setup

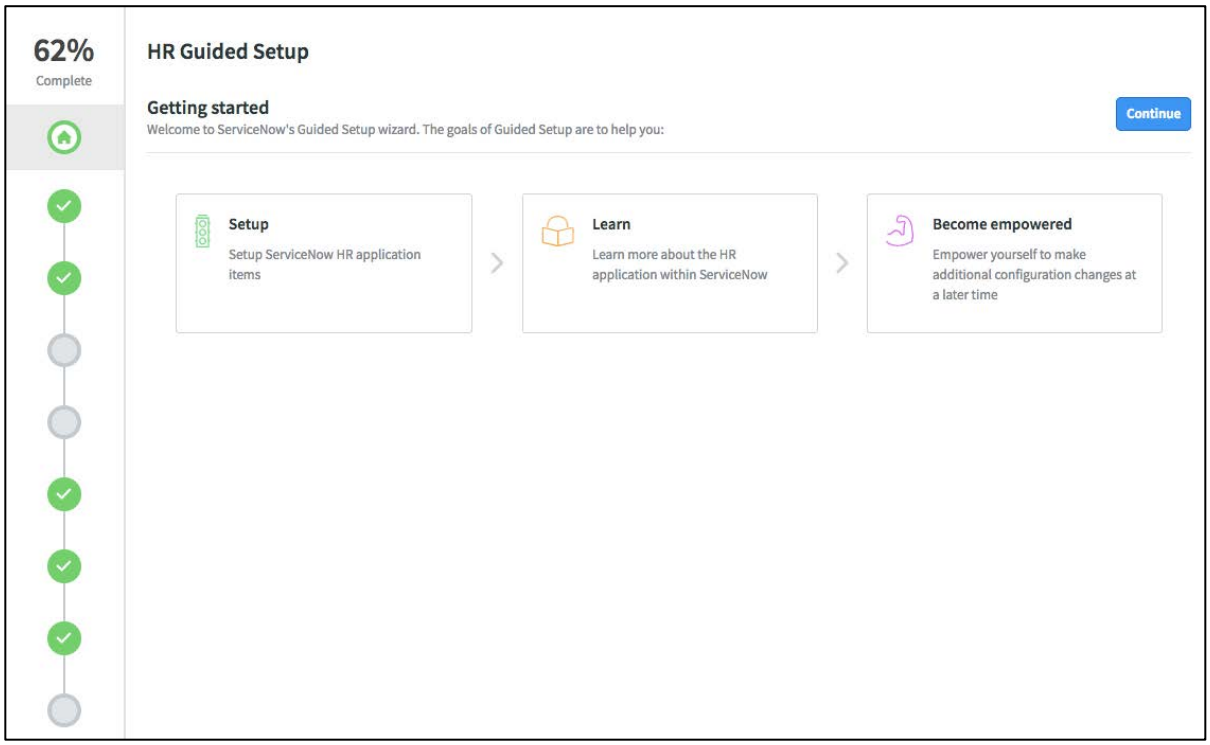
Log onto Your Training ServiceNow Instance

1. Navigate to the unique instance URL provided to you and log on as the **hradmin** user.

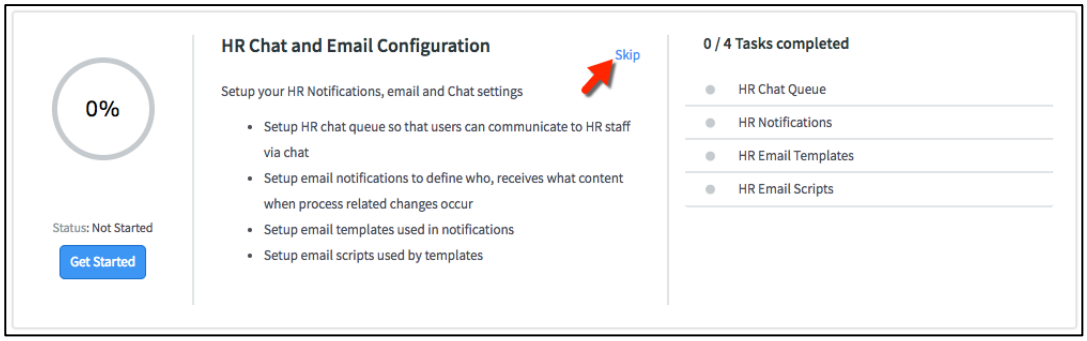


HR Chat and Email Configuration

1. Navigate to **Guided Setup** and click the **Continue** button.

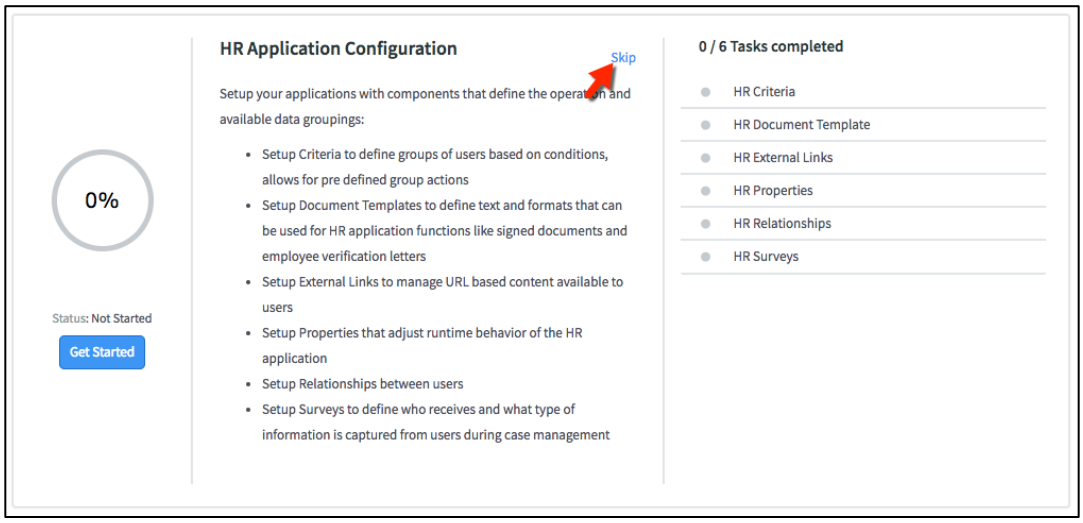


2. Navigate to **HR Chat and Email Configuration** section, review tasks and then click the **Skip** link.



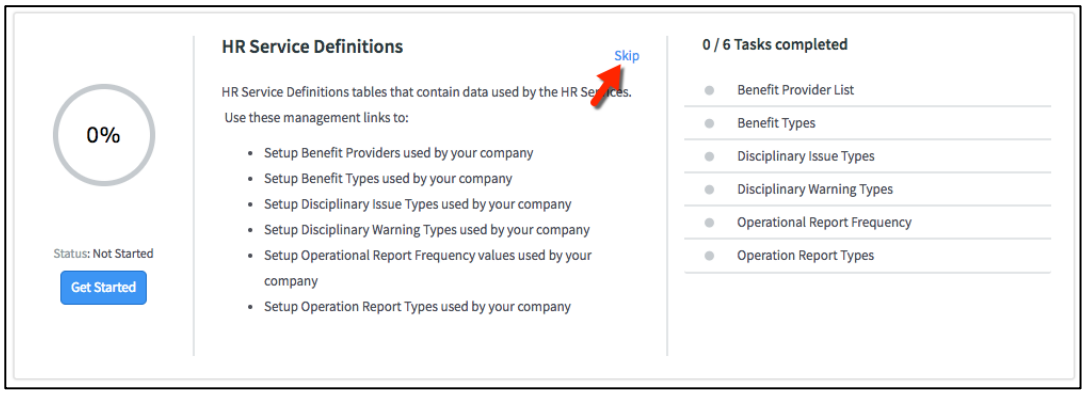
HR Application Configuration

1. Navigate to **HR Application Configuration** section, review tasks and then click the **Skip** link.



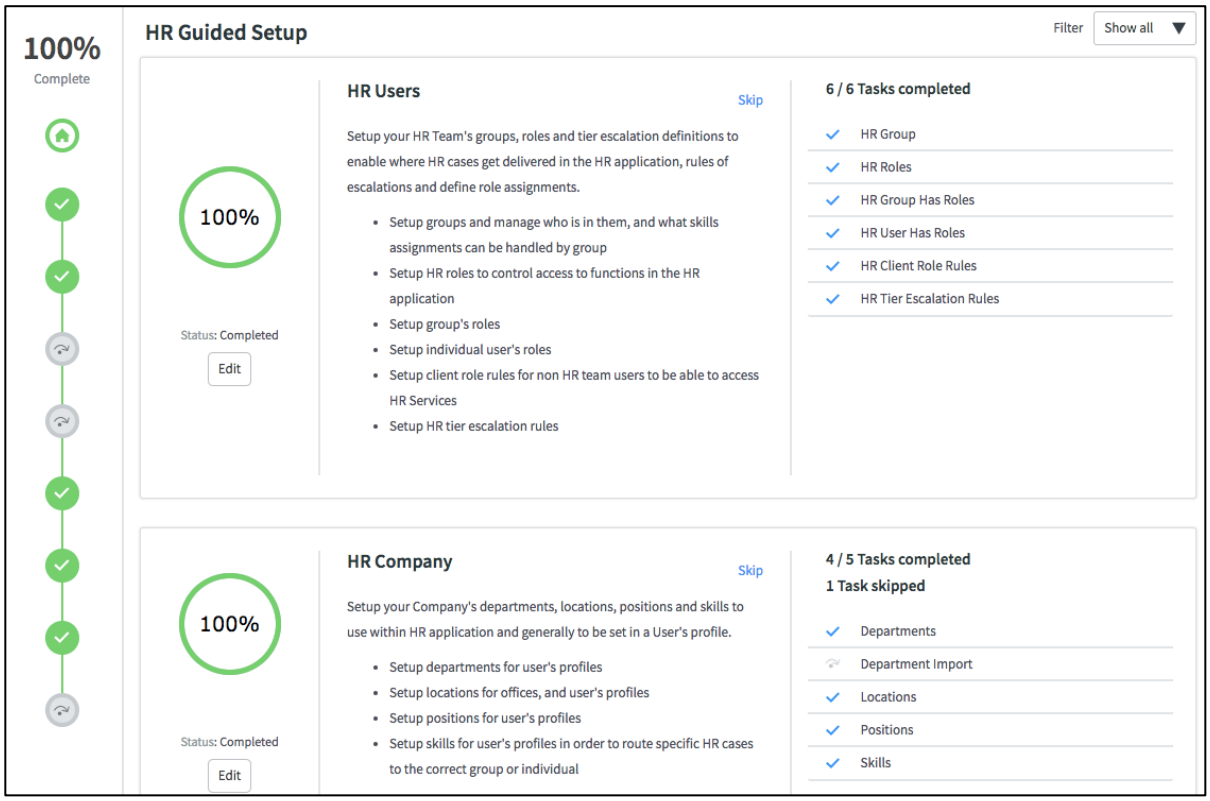
HR Service Definitions

1. Navigate to **HR Service Definitions** section, review tasks and then click the **Skip** link.



Lab Success Verification

1. The **HR Guided Setup** is 100% complete.



Lab Goal

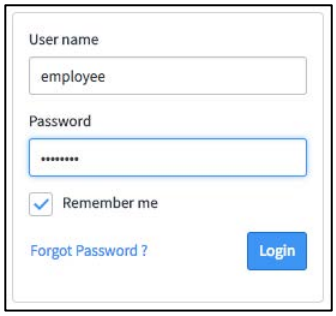
This lab verifies the completed configuration and tests that the new HR Service is working correctly.

1. Submit new HR Service request
2. Review new HR Service case

Lab 7.0
Test New HR Service

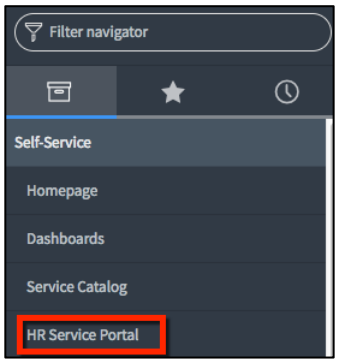
Log onto Your Training ServiceNow Instance

1. Navigate to the unique instance URL provided to you and log on as the **employee** user.

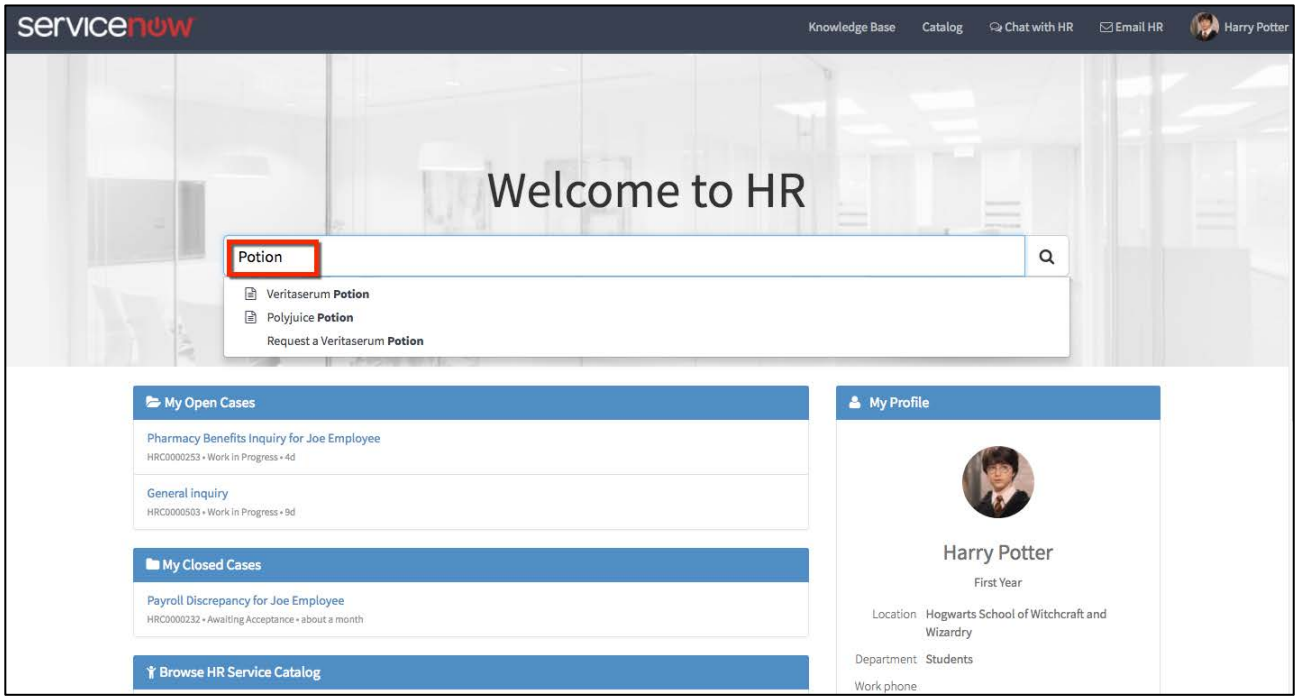


Submit new HR Service request

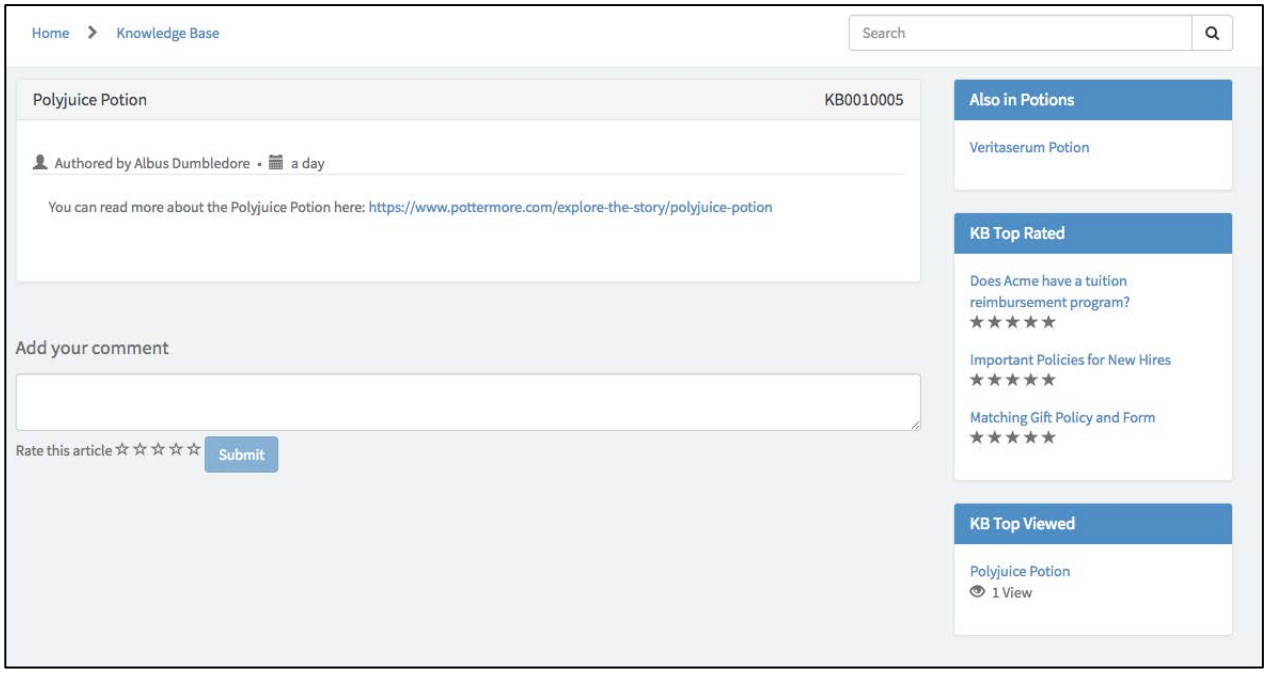
1. Navigate to the **HR Service Portal**.

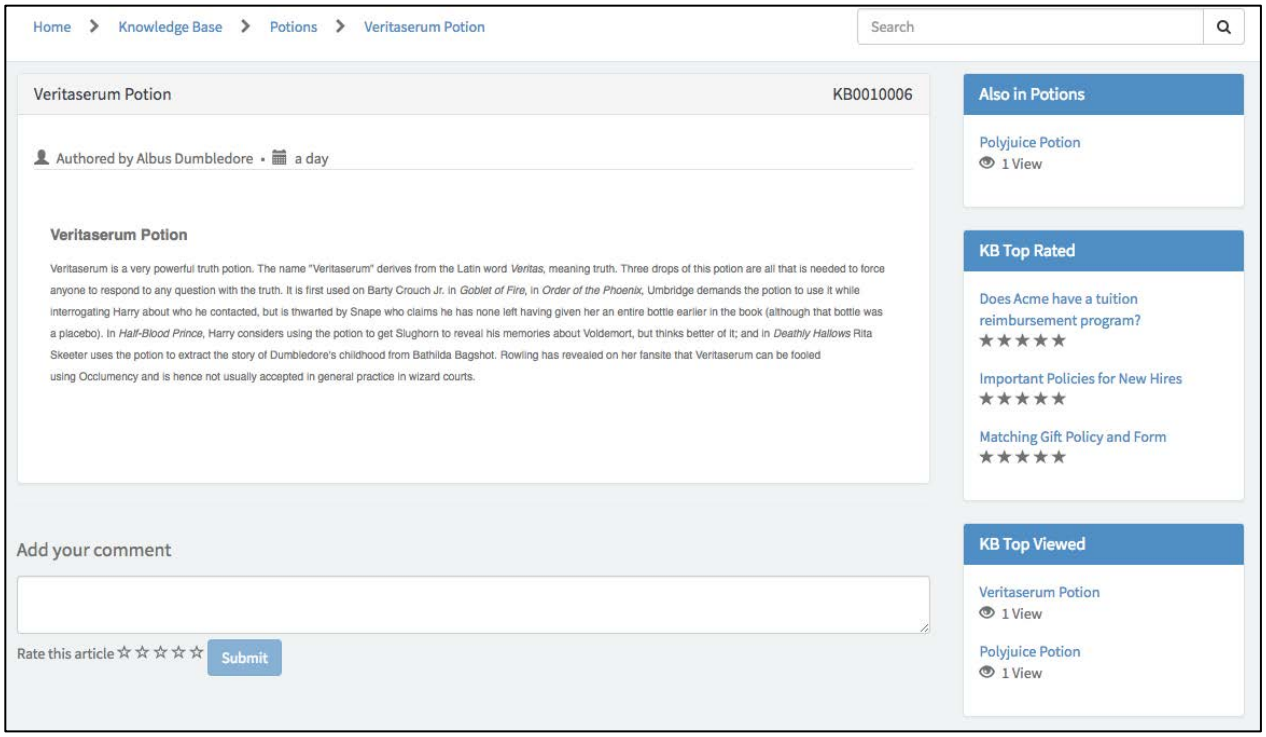


2. Search for **Potion**.

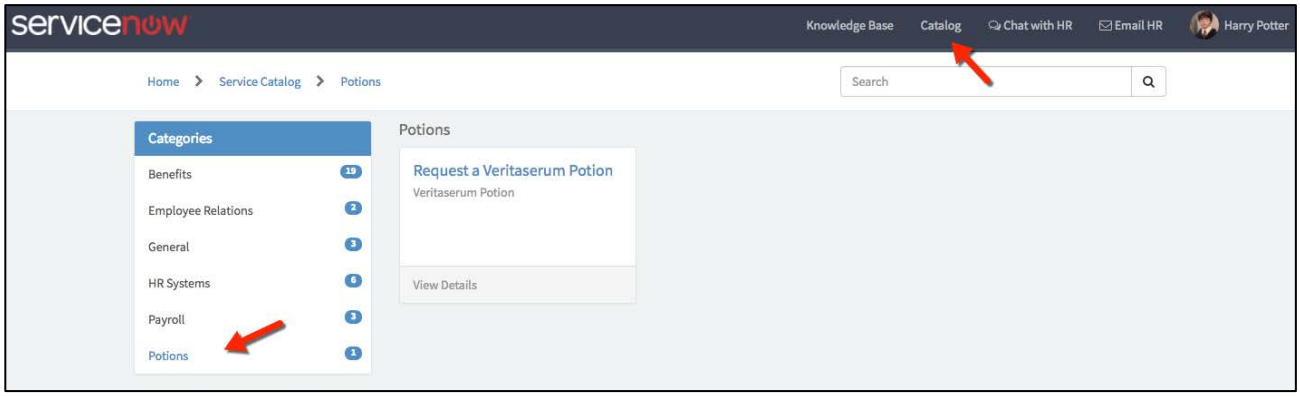


3. View **Polyjuice Potion** and **Veritaserum Potion** Knowledge Articles.

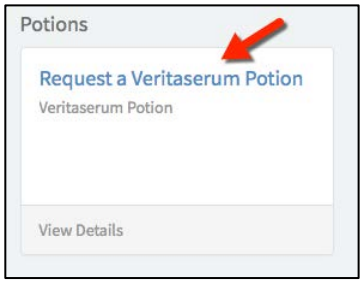




4. Click **Catalog** link and then the **Potions** category link.



5. Click the **Request a Veritaserum Potion** HR Service Catalog Item.

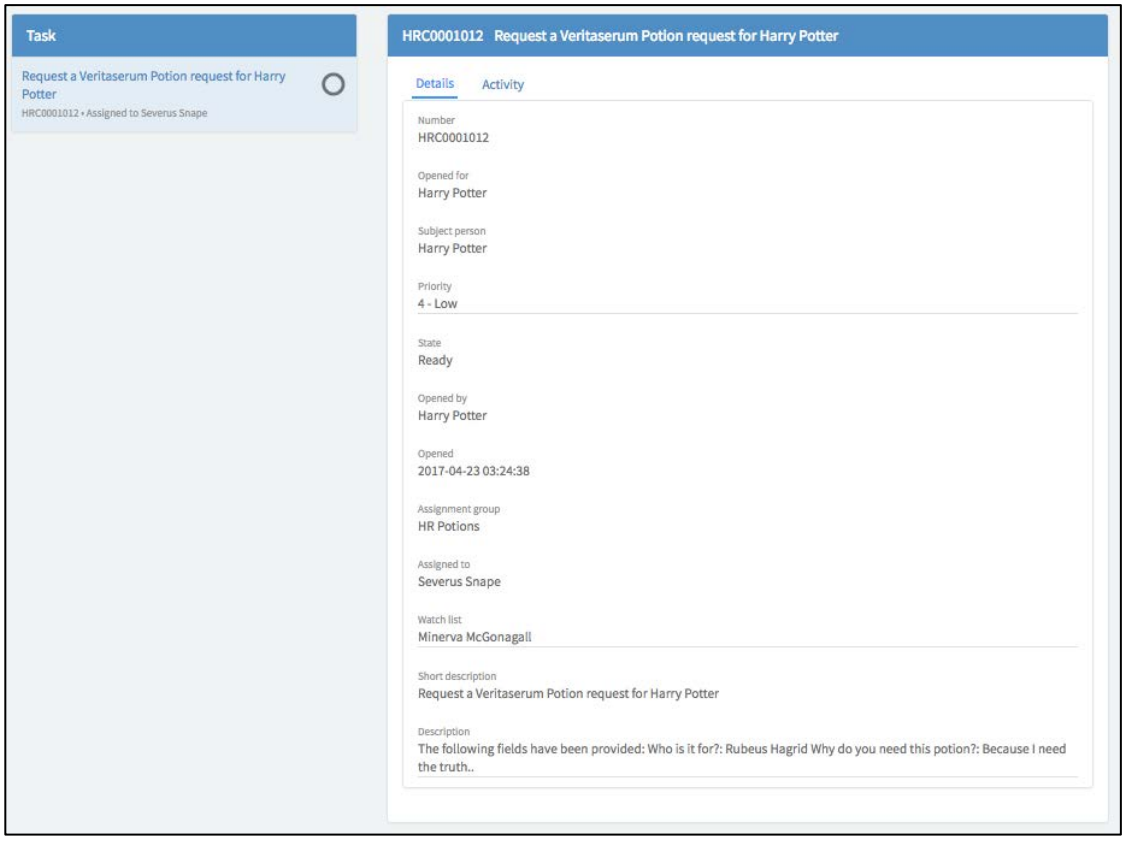


6. Complete the form with the following values and then click **Submit**:

   Why: **Because I need the truth..**
   Who: **Rubeus Hagrid**

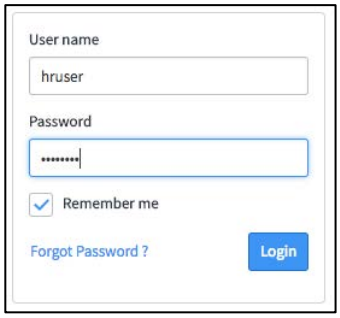


7. Review **HR Case** created for **Harry Potter**.

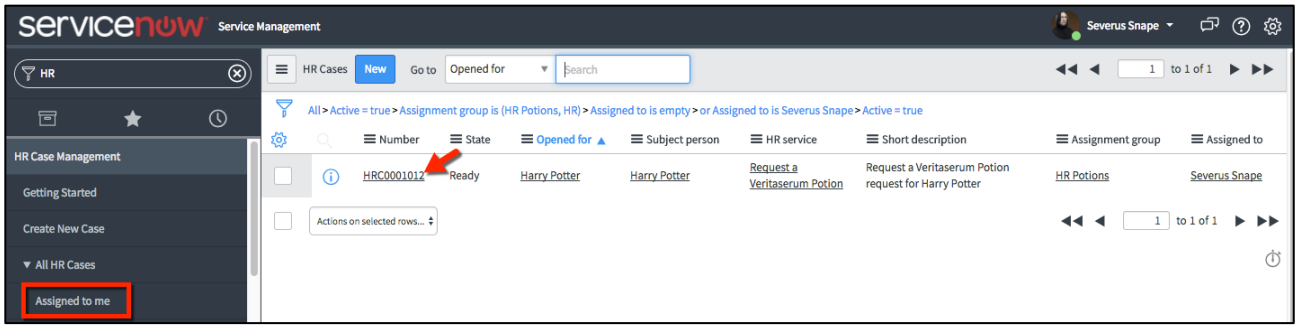


Review new HR Service case

1. Logon on as **hruser**.

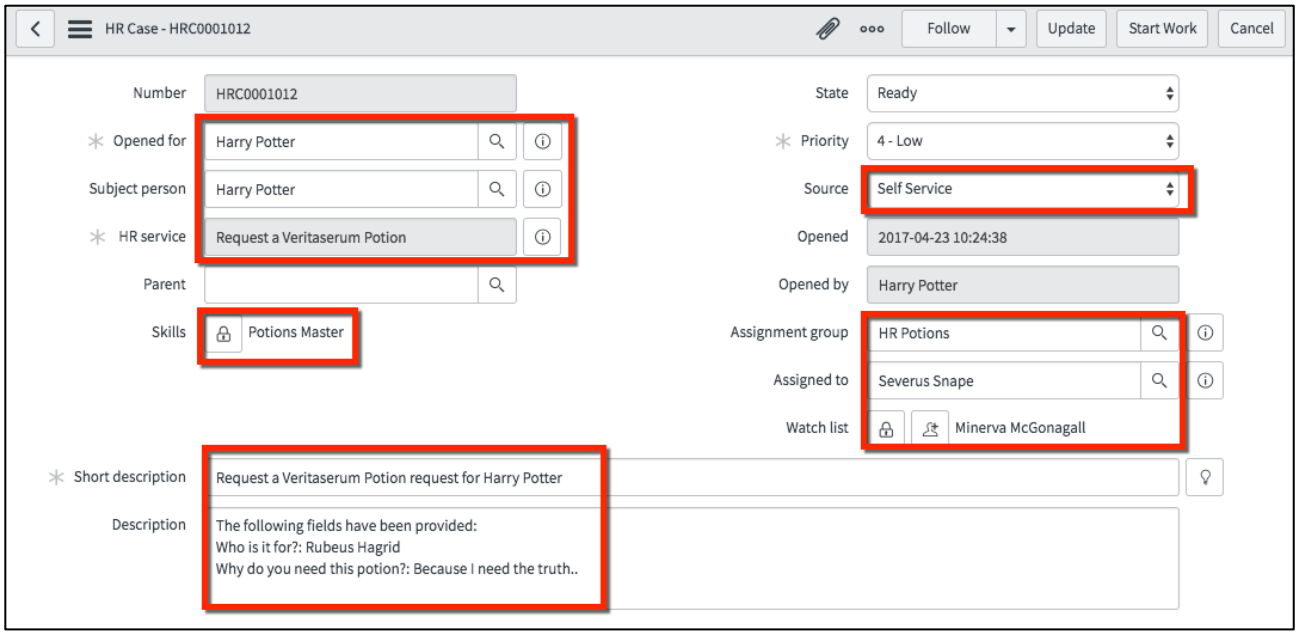


2. Navigate to cases **Assigned to me** and select new **Request a Veritaserum Potion** case.

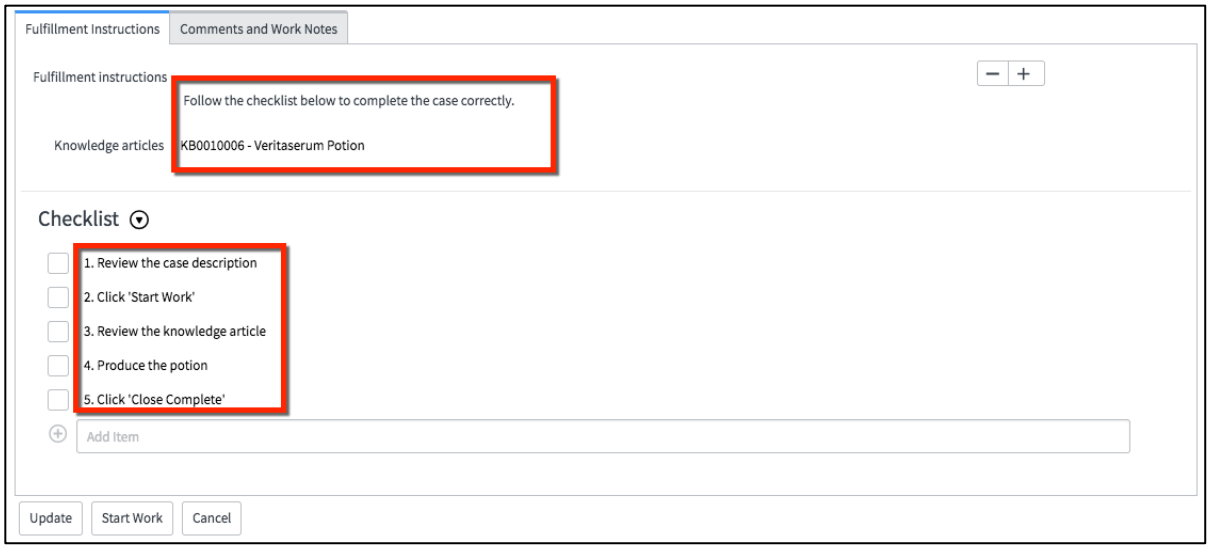


3. Review the following case form details:

Opened for/Subject Person: **Harry Potter**
HR Service: **Request a Veritaserum Potion**
Skills: **Potions Master**
Source: **Self Service**
Assignment Group: **HR Potions**
Assigned to: **Severus Snape**
Watch list: **Minerva McGonagall**
Short Description/Description



4. Scroll down and review the configured **Fulfillment Instructions.**



5. Congratulations, you have successfully completed the hands-on lab.

Lab Goal

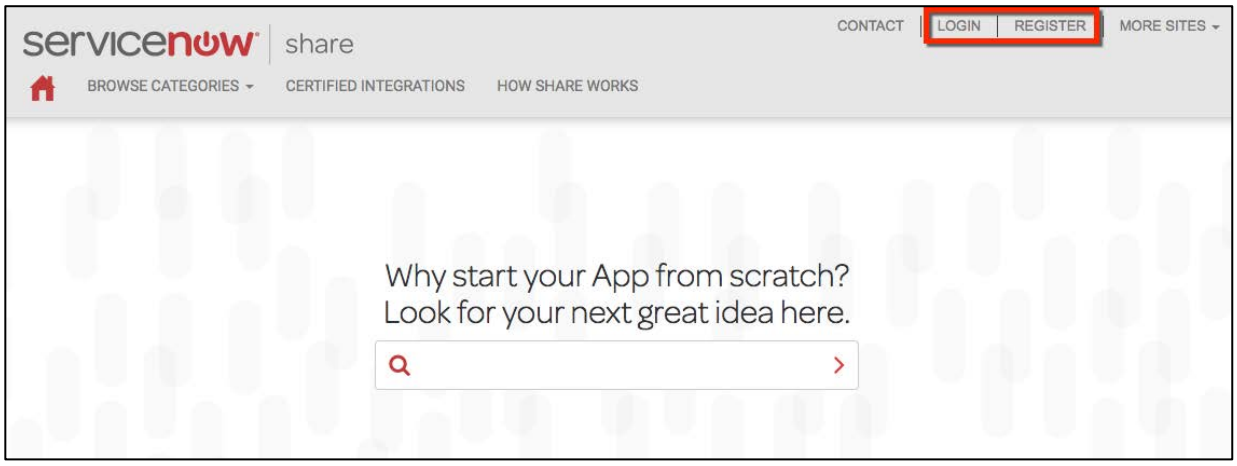
This bonus lab explains how you can easily replace the standard HR Service Portal design.

1. Retrieve update set
2. Install update set

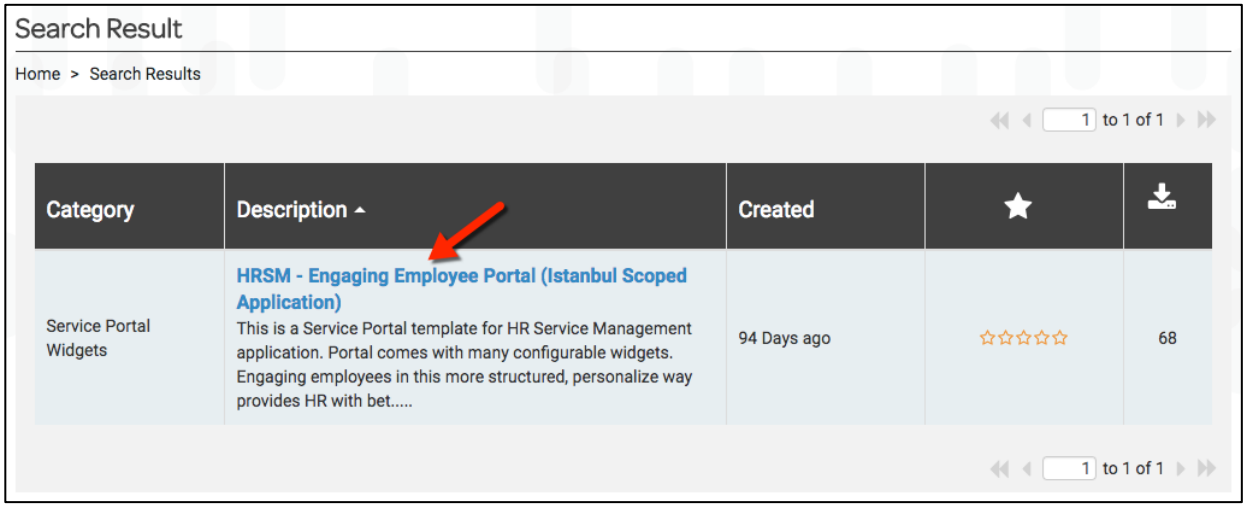
Bonus Lab
Customize HR Service Portal

Retrieve Update Set

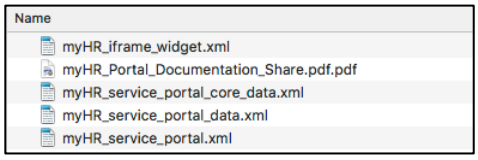
1. Go to **https://share.servicenow.com** and **Login/Register.**



2. Search for **HRSM** and select the **Engaging Employee Portal**.



3. **Download** the update set and the 4 supporting files on the **Details** tab.

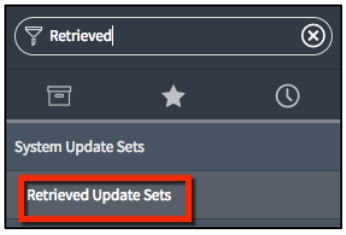


Install Update Set

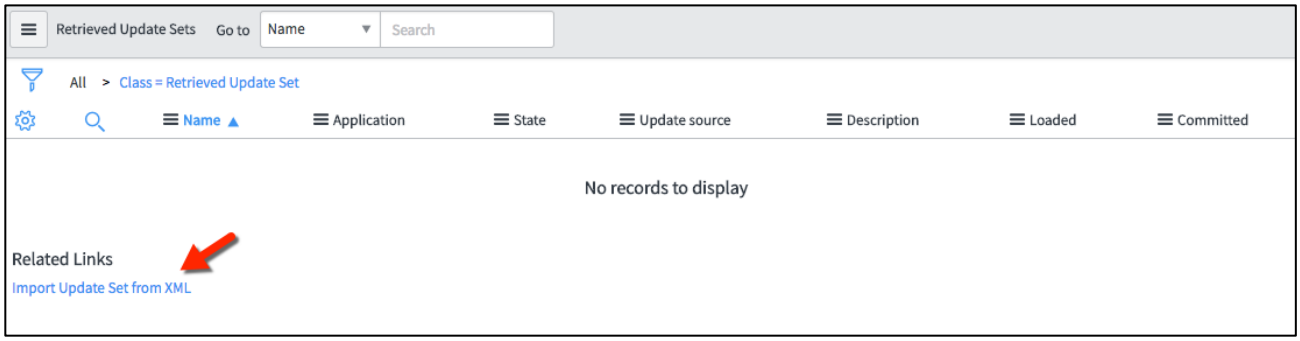
1. Login as **hrdmin**.



2. Navigate to **Retrieved Update Sets**.



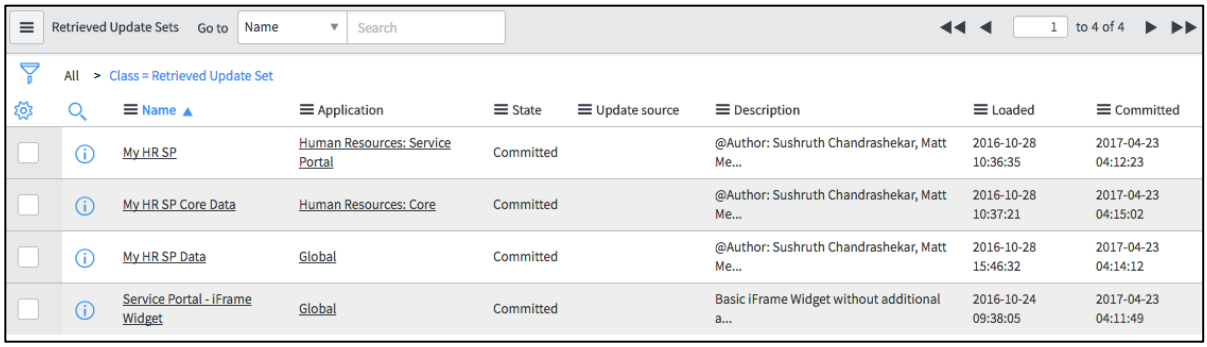
3. Click on the **Import Update Set from XML** link.



4. **Import** all files as detailed in **Documentation** file.

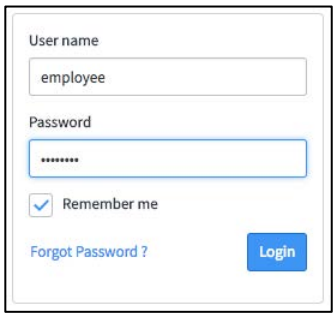
Repeat these steps for each update set, in this **exact order**:
- 1_myHR_iframe_widet.xml
- 2_myHR_service_portal.xml
- 3_myHR_service_portal_data.xml
- 4_myHR_service_portal_core_data.xml

5. Once completed the screen should look as follows:



Lab Success Verification

1. Login as **employee**.



2. Navigate to **https://<your instance name>/myhr** and review the alternative **HR Service Portal** branding.

