Lab Guide

Enterprise Onboarding:

Benefits and How to Configure Our New Enterprise Onboarding Solution to Meet Your Organization's Process

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Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

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Lab Goal

Lab 1.1 Create an Activity with a Task for an External Link

This lab explains the steps to configure an Activity in the Pre-hire Activity Set of the Onboarding Lifecycle Event. This lab includes the following tasks:

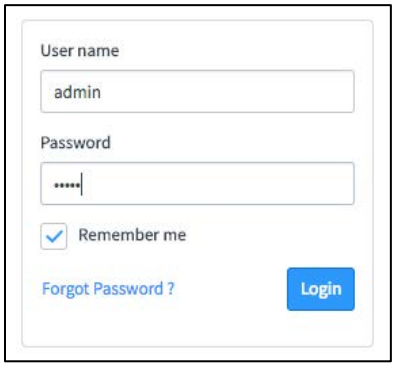
- Create an Activity
- Configure an HR Task Template
- Commit your changes
- Submit and Onboarding Request and review your changes

Prerequisites

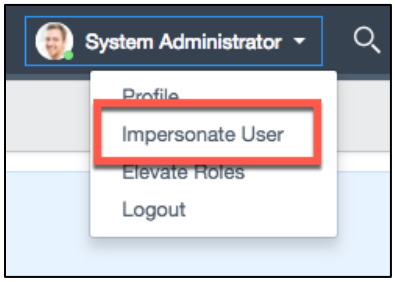
Knowledge of the ServiceNow interface and how to impersonate a User. Login to your environment and impersonate the HR Admin user

Login Impersonating HR Admin

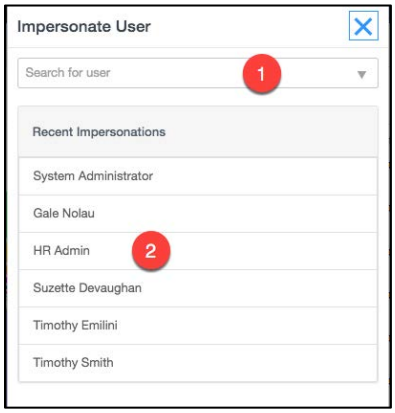
1. Login into your instance:
   Username: **admin**
   Password: **[will be provided]**



2. Impersonate the HR Admin user. Click the drop-down menu next to the user name at the top-right corner of the screen. Select **Impersonate User.**



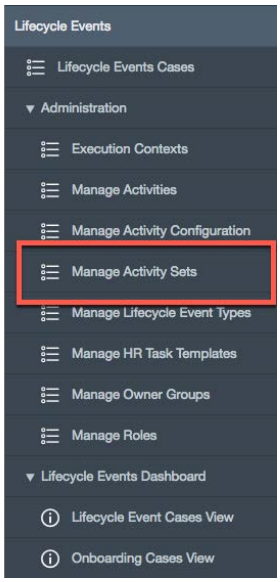
3. Type **HR Admin** in the **Search for user** box and select **HR Admin**.



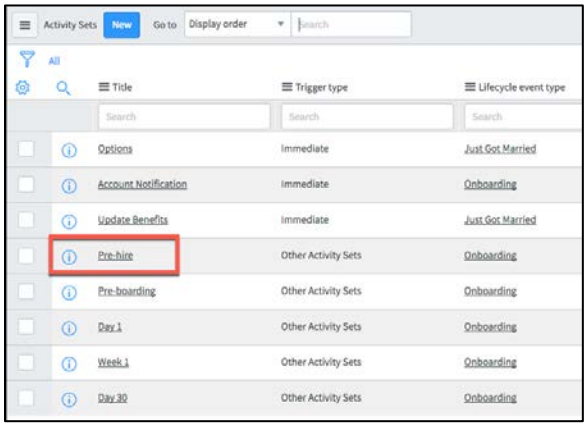
You are now HR Admin.

Create New Activity – Benefits Enrollment (URL)

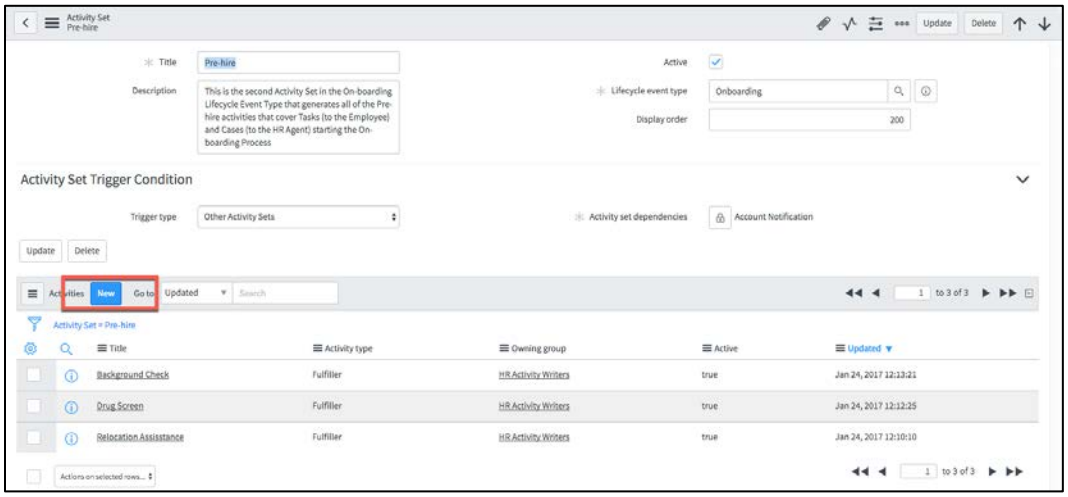
1. Navigate to **Lifecycle Events > Manage Activity Sets**.



2. Click the **Pre-hire Activity Set**.



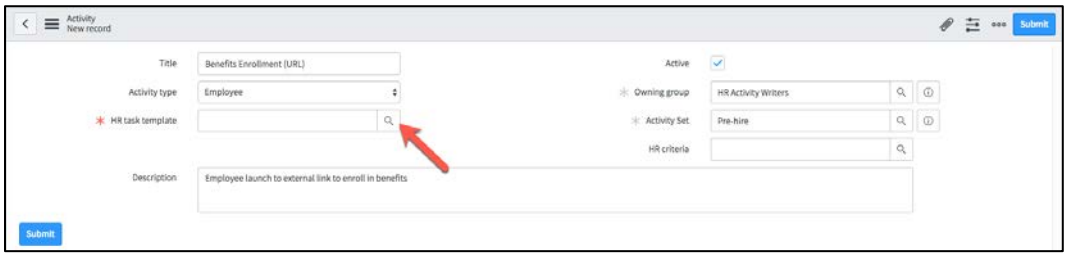
3. Click the **New** button to open a new Activity window.



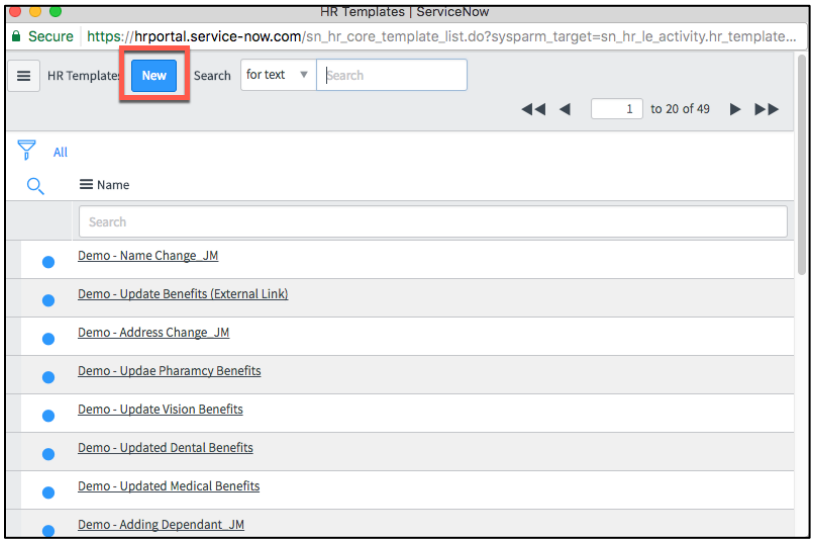
4. Enter the details for the new **Activity**:
   Title: **Benefits Enrollment (URL)**
   Activity Type: **Employee**
   Owning Groups: **HR Activity Writers**
   Description: **Employee launch to external link to enroll in benefits**



5. Click the **magnifying glass** next to the **HR task template** field.

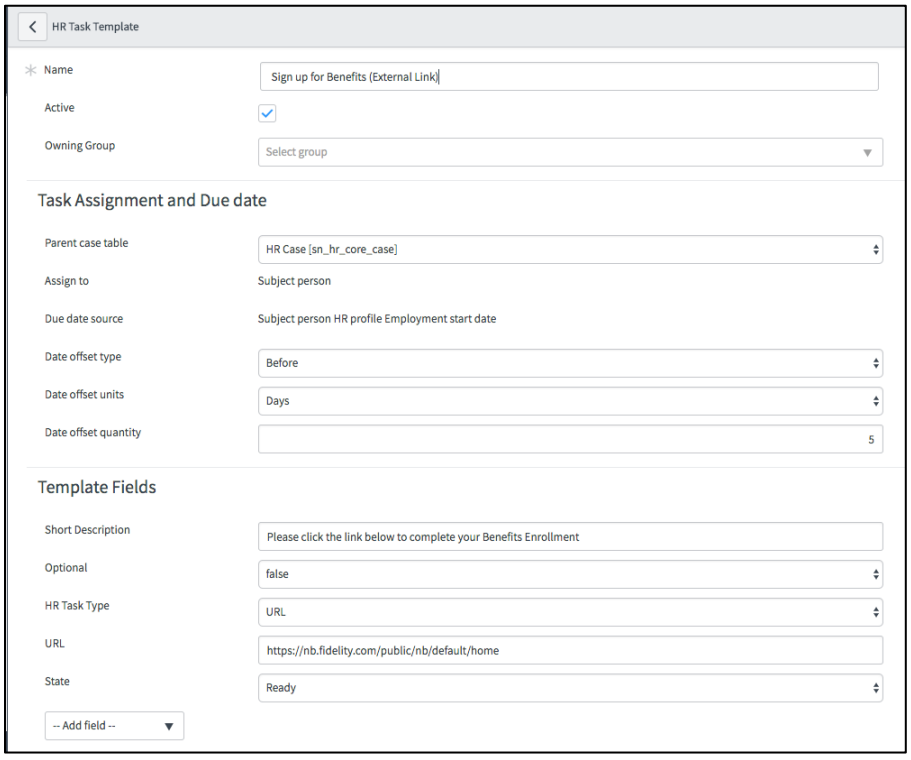


6. The **HR Templates** dialog window opens. Click **New** to start a new HR Task Template.



7. Enter the details for the new **HR Task Template**:

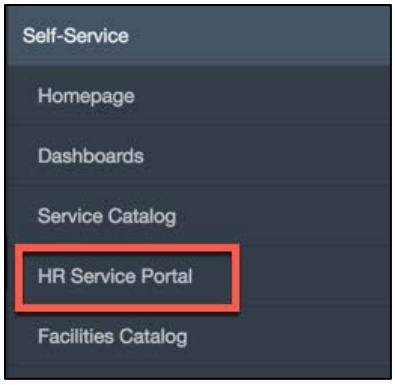
   Name: **Sign up for Benefits (External Link)**
   Task Assignment and Due Date
   Parent Case Table: **HR Case (sn_hr_core_case)**
   Assign to: **Subject Person**
   Due date source: **Subject person HR profile Employment start date**
   Date offset type: **Before**
   Date offset units: **Days**
   Date offset quantity: **5**
   Template Fields
   Short Description: **Please click the link to complete your Benefits Enrollment**
   Optional: **false**
   HR Task Type: **URL**
   URL: **https://nb.fidelity.com/public/nb/default/home**
   State: **Ready**



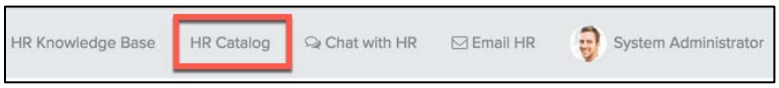
8. Click **Submit.** You return to the Activity Page. Click **Submit** and now you are ready to test.

Lab Verification

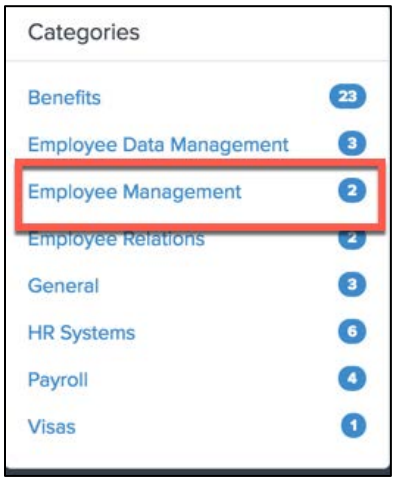
1. Need to switch user, impersonate Gale Nolau. Gale is a Hiring Manager in our demo data.
2. Once you have impersonated Gale, click the **HR Service Portal** from the left navigation panel to open the Employee Service Center.



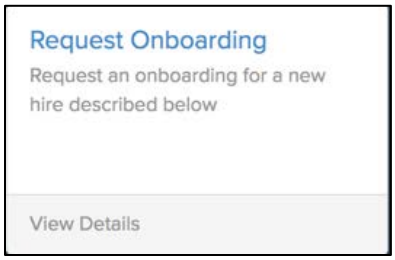
3. In the HR Service Portal, click the **HR Catalog** button.



4. In the HR Catalog, click **Employee Management** in the Catalog Categories.

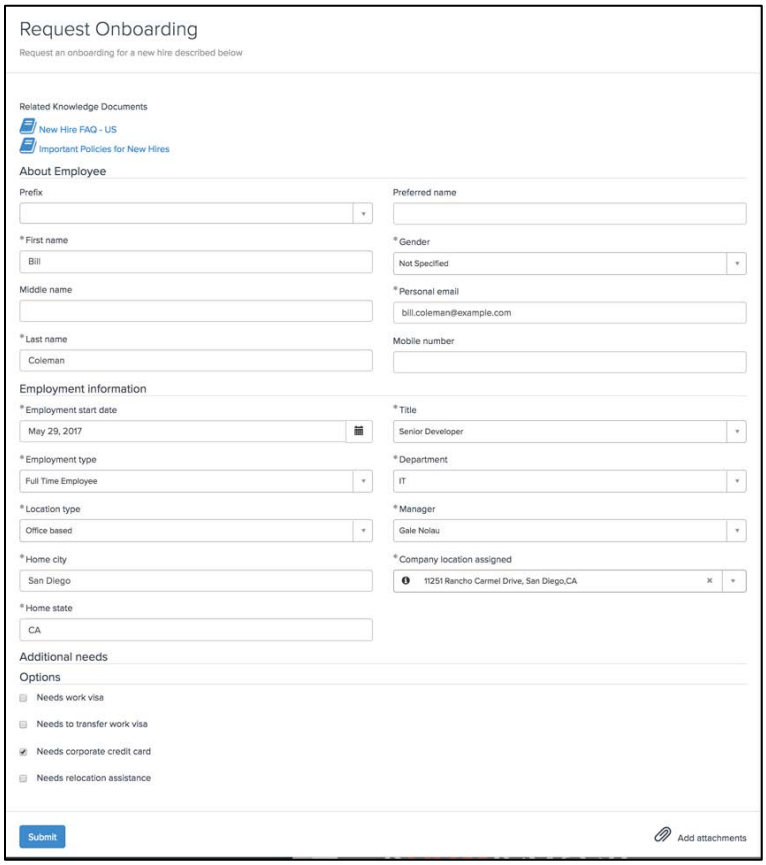


5. In the Employee Management category, click the **Request Onboarding** request.



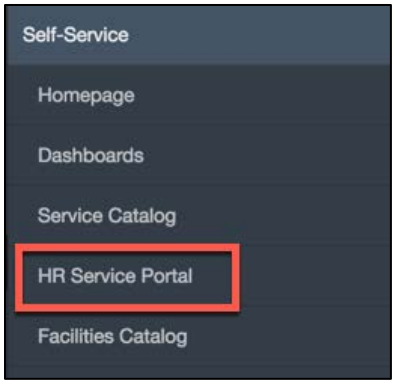
6. Fill out the Request Onboarding request and click **Submit**.

   First name: **Bill**
   Last Name: **Coleman**
   Employment Start Date: **May 29, 2017**
   Employment Type: **Fulltime**
   Location Type: **Office based**
   Home city: **San Diego**
   Home state: **CA**
   Gender: **Male**
   Personal email: **bill.coleman@example.com**
   Title: **Senior Developer**
   Department: **IT**
   Manager: **Gale Nolau**
   Company location assigned: 11251 Rancho Carmel Drive, San Diego, CA
   Options select: **Needs corporate credit card**

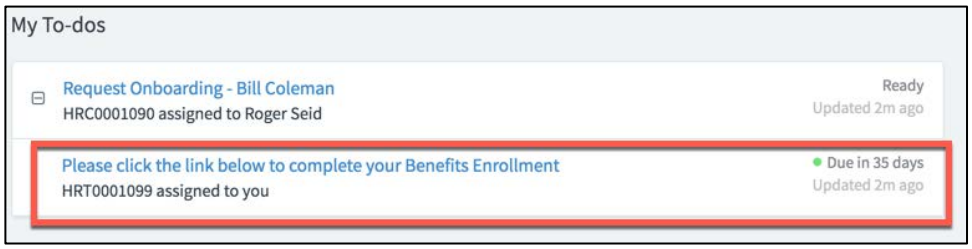


7. Close that browser window and switch user; impersonate **Bill Coleman**. Bill is the New Hire you just created.

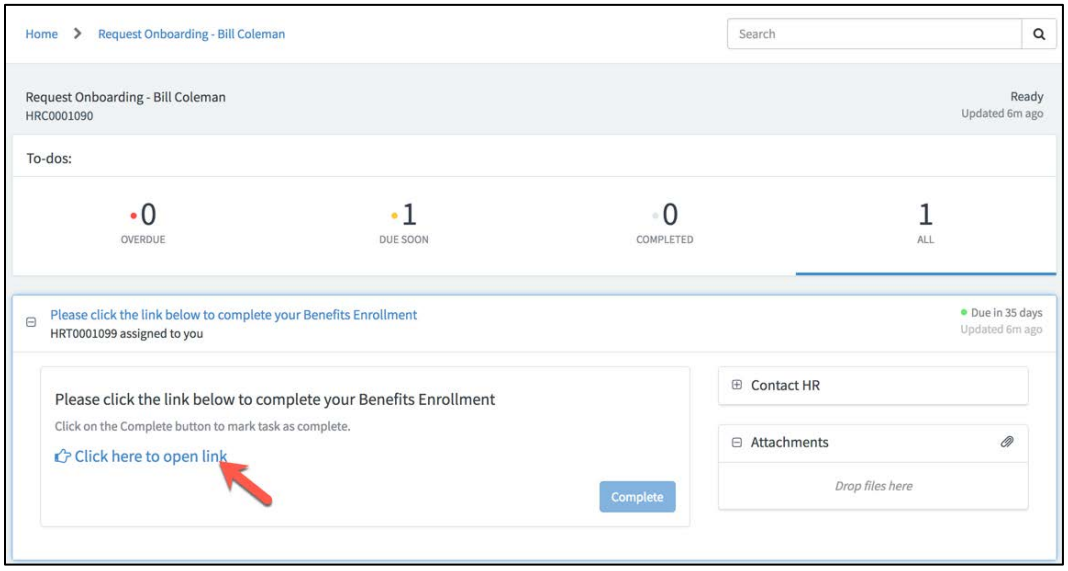
8. As Bill, click the HR Service Portal from the **left** navigation panel to open the **Employee Service Center**.



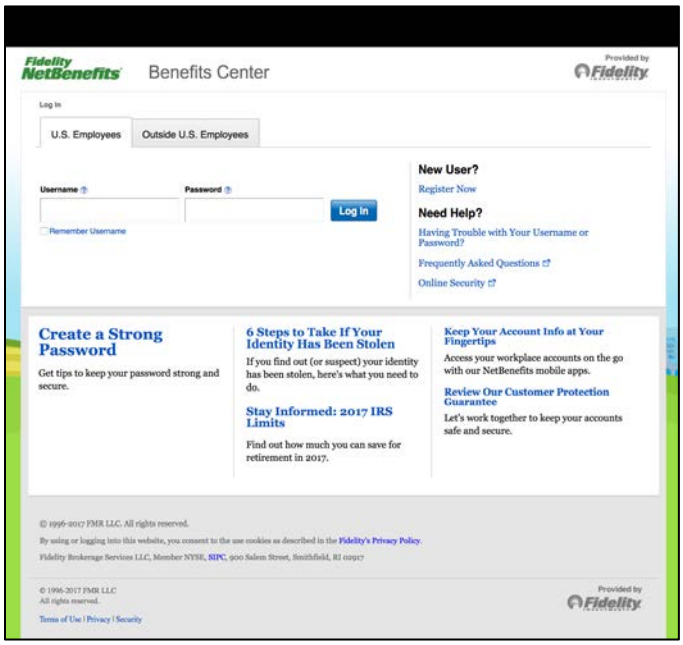
9. Scroll to **My To-dos** and click the **Benefits** task.



10. You should now see the Task assigned to Bill, and he can click to open the link to the Benefits Site.



11. Click **Click here to open link** to navigate to the URL configured in the task.



Lab Goal

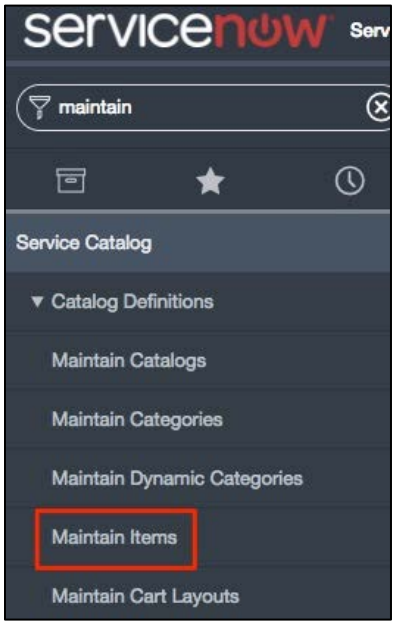
Lab 1.2
Create a Non-HR Activity

The onboarding process requires several action items along the way including facilities setting up a desk space, IT provisioning a laptop, or a manager delegating specific access based on the new hire's role. This lab enable you to:

- Set up a new catalog item
- Create a new HR Template
- Assign a template to an activity
- Create rules and conditions for the activity
- Check your work to ensure what you built functions properly

Create a Catalog Item

1. Navigate to **Service Catalog** > **Maintain Items**.

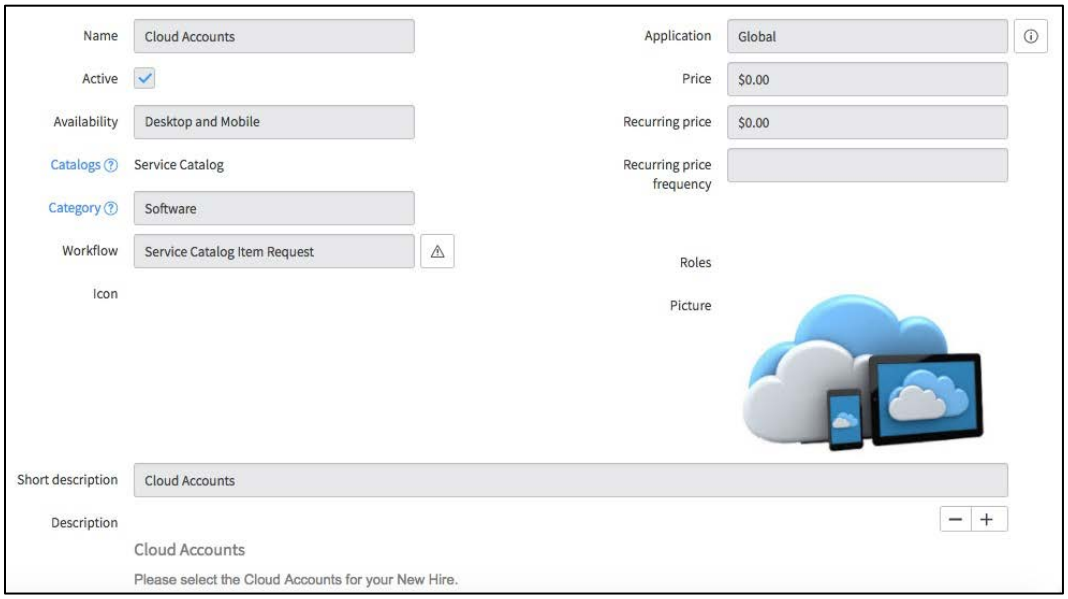


2. Select **New**.

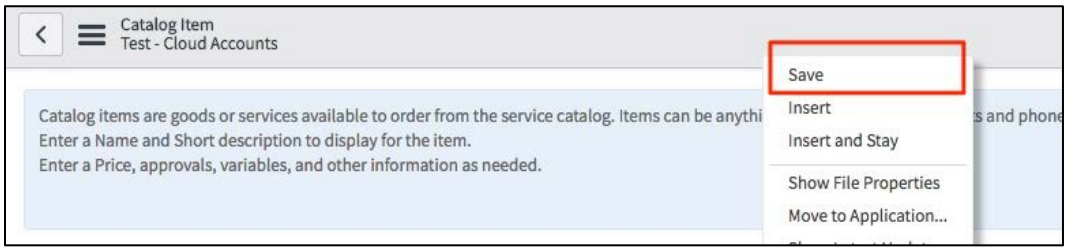


3. Enter the following information on the Catalog Item form:

   Name: **Cloud Accounts**
   Active: **True (check the box)**
   Availability: **Desktop and Mobile**
   Catalogs: **Service Catalog**
   Category: **Software**
   Workflow: **Service Catalog Item Request**
   Application: **Global**
   Price: **$0.00**
   Recurring Price: **$0.00**
   Recurring Price Frequency: **Leave blank**
   Picture: **Load the cloud_accounts_picture.jpeg from the lab folder**
   Short Description: **Cloud Accounts**
   Description: **Please select the Cloud Accounts for your New Hire:**



4. Right-click the top gray bar on the form and select **Save.**

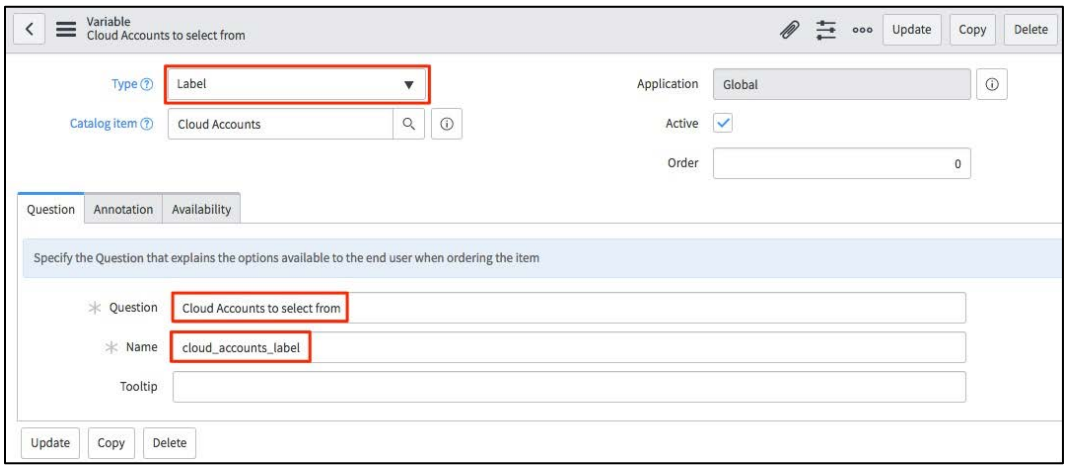


5. Navigate to **Related Links > Variables > New**.



6. Complete the Variable form with the following information:

   Type: **Label**
   Catalog Item: **Cloud Accounts**
   Active: **True (check the box)**
   Question: **Cloud Accounts to select from**
   Name: **cloud_accounts_label**



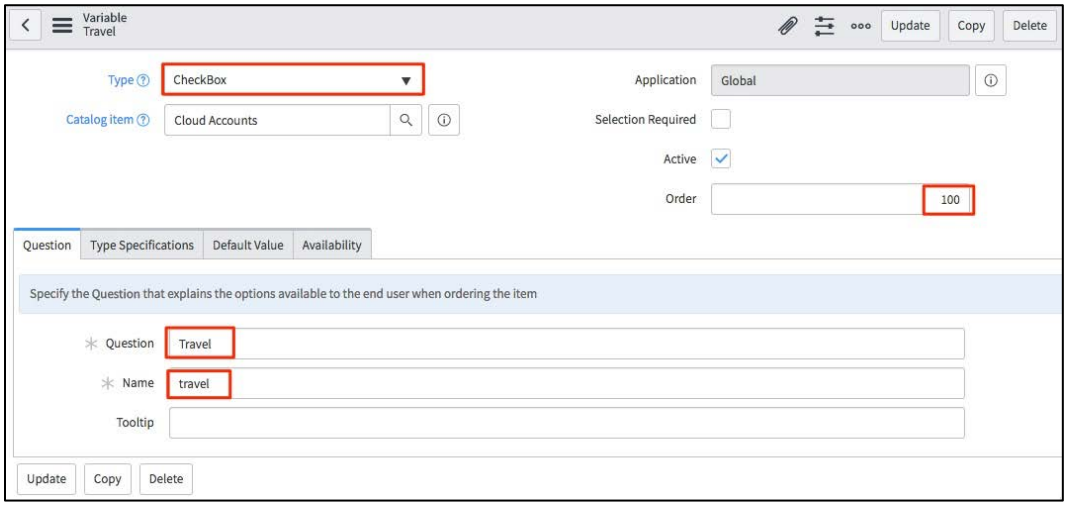
7. Click **Submit.**

8. Navigate to **Related Links > Variables > New**.



9. Complete the Variable form with the following information:

   Type: **CheckBox**
   Catalog Item: **Cloud Accounts**
   Active: **True (check the box)**
   Order: **100**
   Question: **Travel**
   Name: **travel**



10. Click **Submit.**

11. Repeat Steps 8 through 10 to create additional variables as seen below:

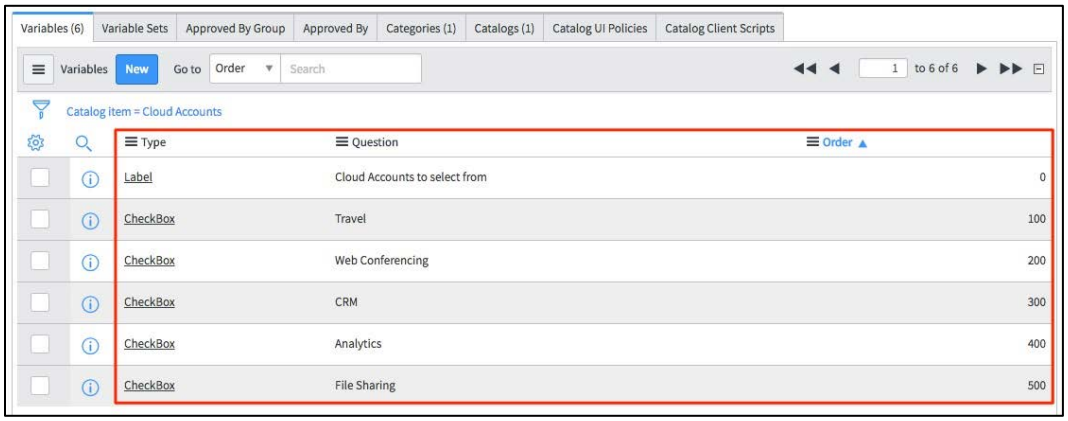
    Type: **CheckBox**
    Catalog Item: **Cloud Accounts**
    Active: **True (check the box)**
    Order: **200**
    Question: **Web Conferencing**
    Name: **web_conferencing**

    Type: **CheckBox**
    Catalog Item: **Cloud Accounts**
    Active: **True (check the box)**
    Order: **300**
    Question: **CRM**
    Name: **crm**

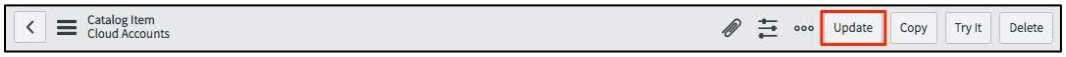
    Type: **CheckBox**
    Catalog Item: **Cloud Accounts**
    Active: **True (check the box)**
    Order: **400**
    Question: **Analytics**
    Name: **analytics**

    Type: **CheckBox**
    Catalog Item: **Cloud Accounts**
    Active: **True (check the box)**
    Order: **500**
    Question: **File Sharing**
    Name: **file_sharing**

12. Confirm your variables now match the below **Type**, **Question**, and **Order.**



13. Click **Update** on the top-right of the form.

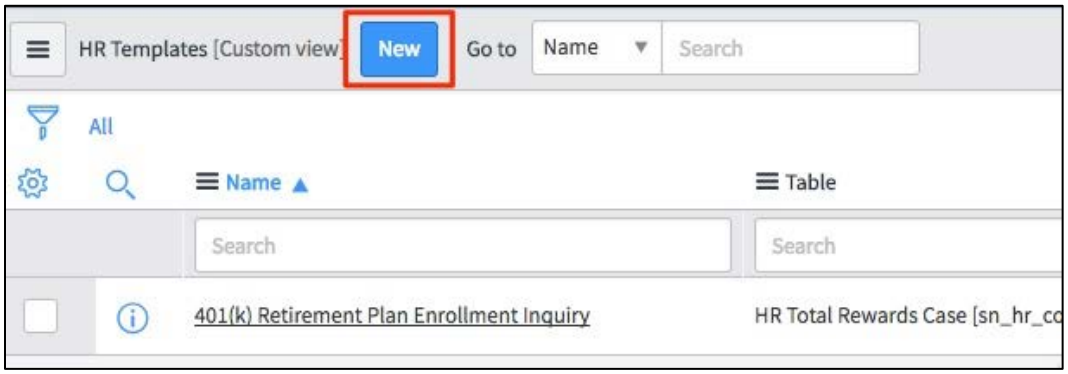


Create an HR Template

1. Navigate to **HR Administration** > **HR Services** > **HR Templates**.



2. Select **New.**



3. Complete the HR Template form with the following information:

   Name: **Request Cloud Accounts**
   Table: **HR Case [sn_hr_core_task]**
   Owning Group: **Leave blank**
   Active: **True (check box)**
   Template: **Leave blank**

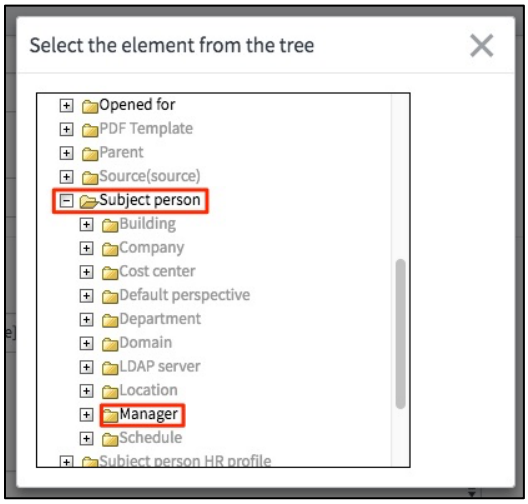


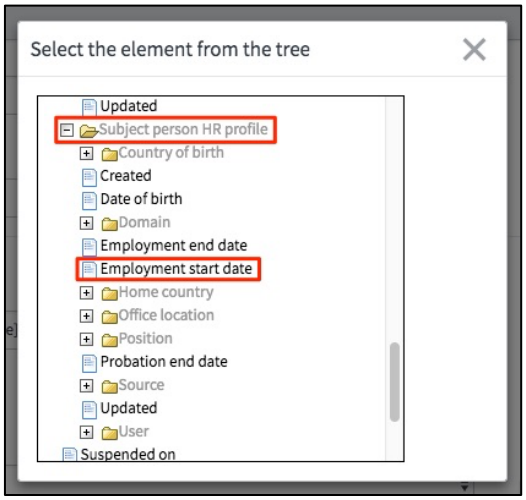
4. Right-click the top bar on the form and select **Save.**



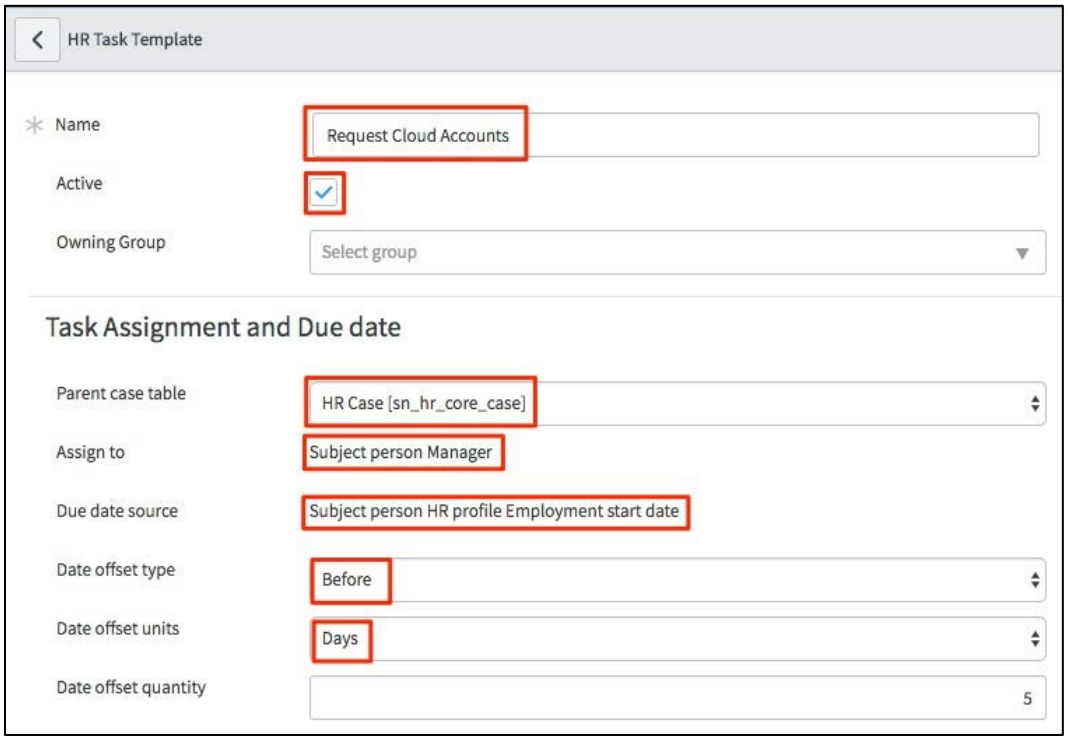
5. Additional fields populate upon saving. Complete the HR Task Template form with the following information:

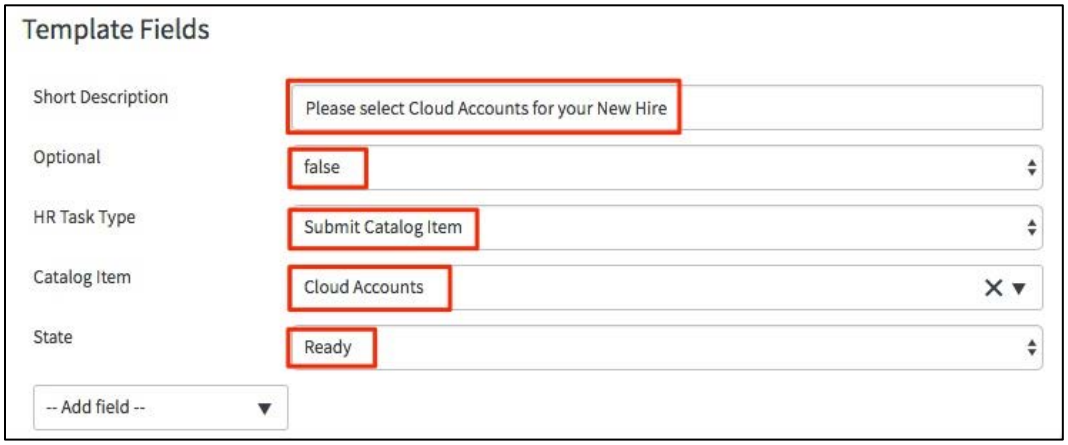
   Parent case table: **HR Case [sn_hr_core_case]**
   Assign to: **Subject person Manager** ***(see screenshot below)***
   Due date source: **Subject person HR profile Employment start date** ***(see screenshot below)***
   Date offset type: **Before**
   Date offset units: **Days**
   Date offset quantity: **5**
   Short Description: **Please select the Cloud Accounts for your New Hire**
   Optional: **false**
   HR Task Type: **Submit Catalog Item**
   Catalog Item: **Cloud Accounts**
   State: **Ready**





6. Check to ensure your form matches the example.

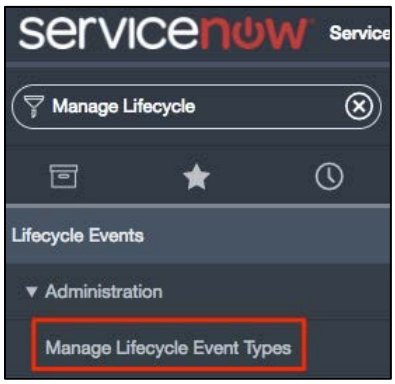




7. Click **Update.**

Add Request Cloud Accounts Template to the Onboarding Lifecycle Event

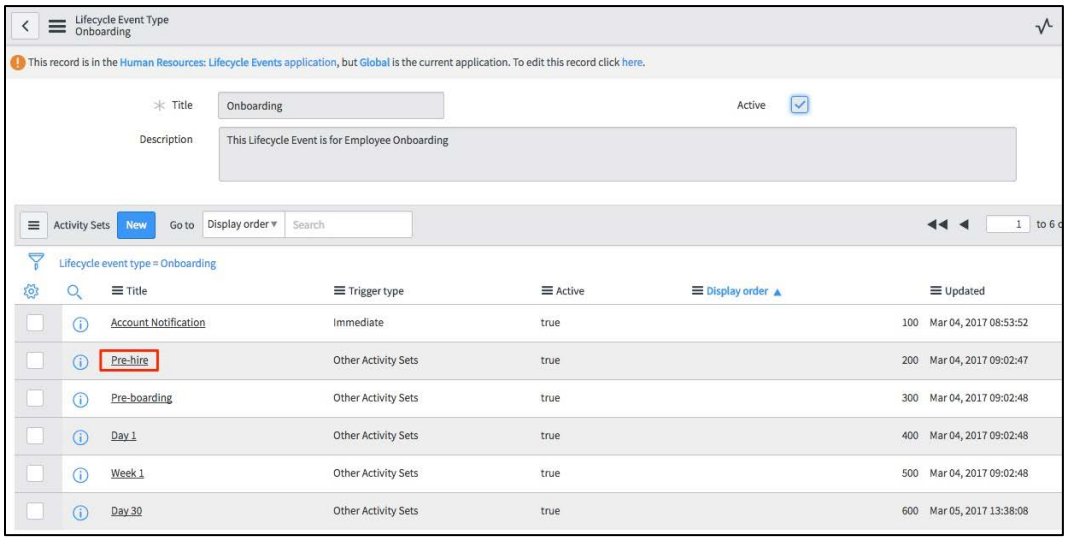
1. Navigate to **Lifecycle Events > Administration > Manage Lifecycle Event Types**.



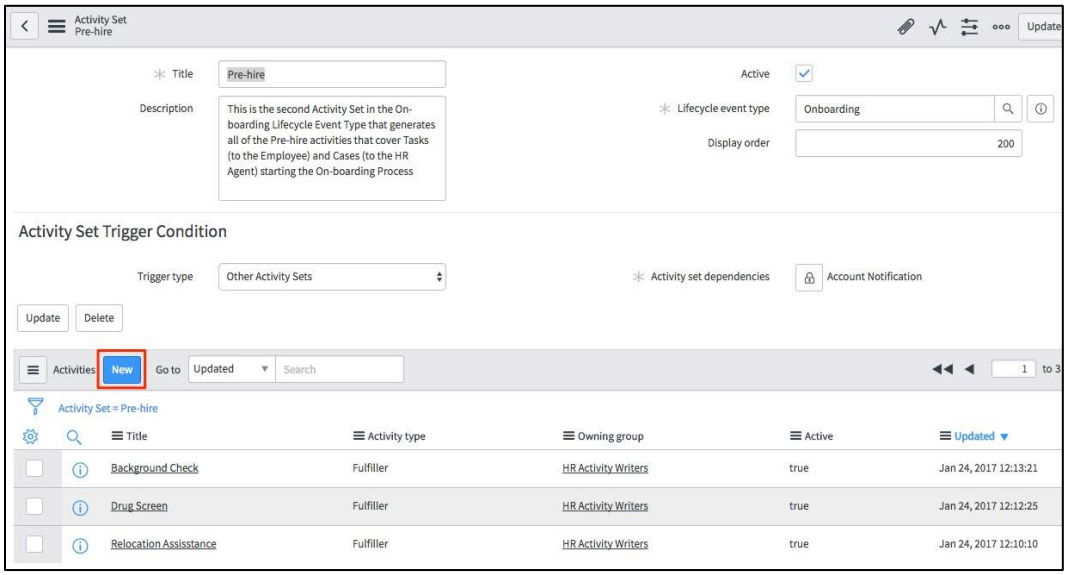
2. Select **Onboarding**.



3. Navigate to **Activity Sets > Pre-hire**.

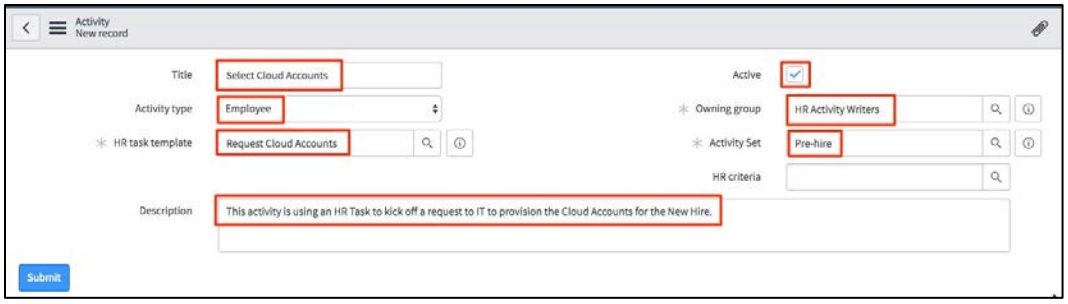


4. Navigate to **Activities > New**.



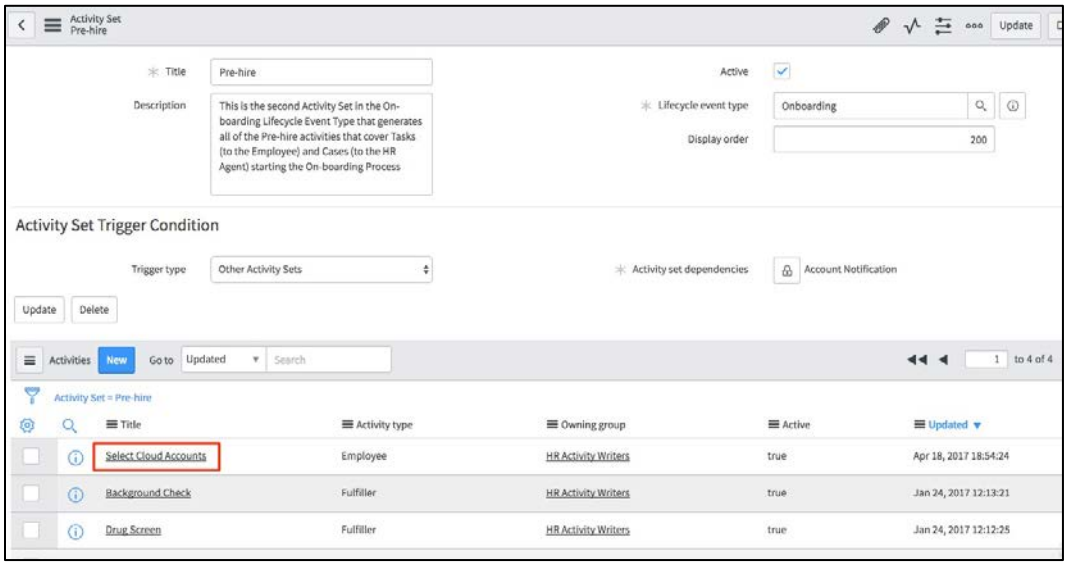
5. Complete the Activity form with the following information:

   Title: **Select Cloud Accounts**
   Activity type: **Employee**
   HR task template: **Request Cloud Accounts**
   Active: **True (check the box)**
   Owning group: **HR Activity Writers**
   Activity Set: **Pre-hire**
   HR criteria: **Leave blank**
   Description: **This activity is using an HR Task to kick off a request to IT to provision the Cloud Accounts for the New Hire.**



6. Click **Submit**.

7. Check to ensure the new activity type is now listed.

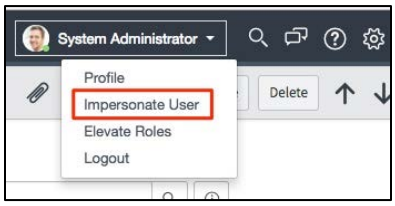


8. Click **Update**.

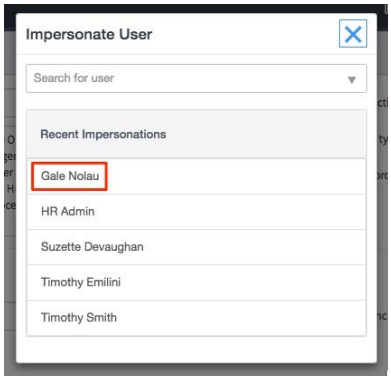


Test What You Built – Create a New Hire Request

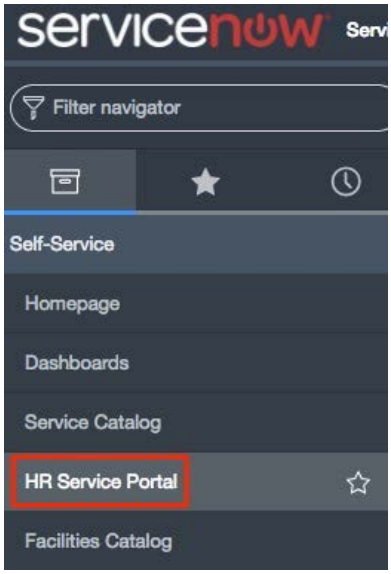
1. Navigate from the top right corner to **> System Administrator > Impersonate User**.



2. Select **Gale Nolau**. *(hiring manager)*



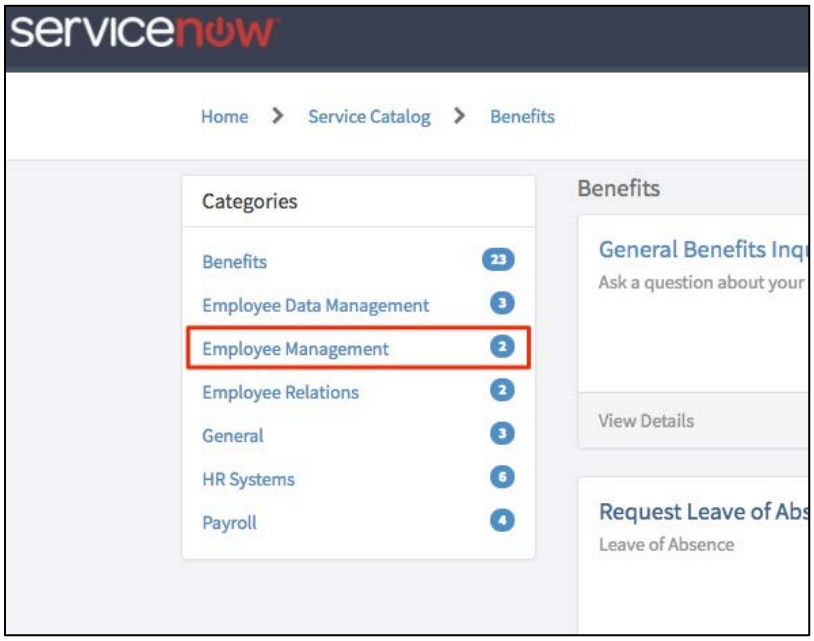
3. Navigate to **Self-Service > HR Service Portal**.
   A new tab opens.



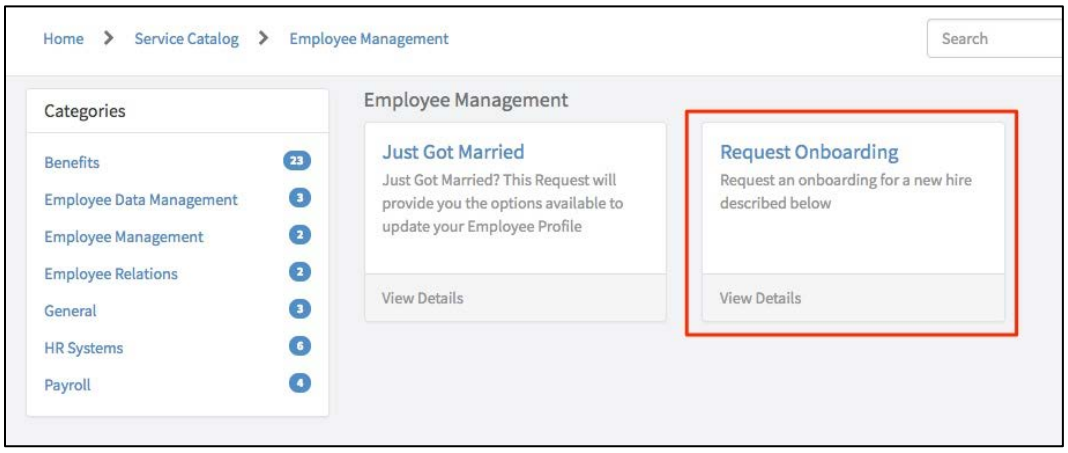
4. Navigate to **HR Catalog.**



5. Select **Employee Management** from the Categories menu.

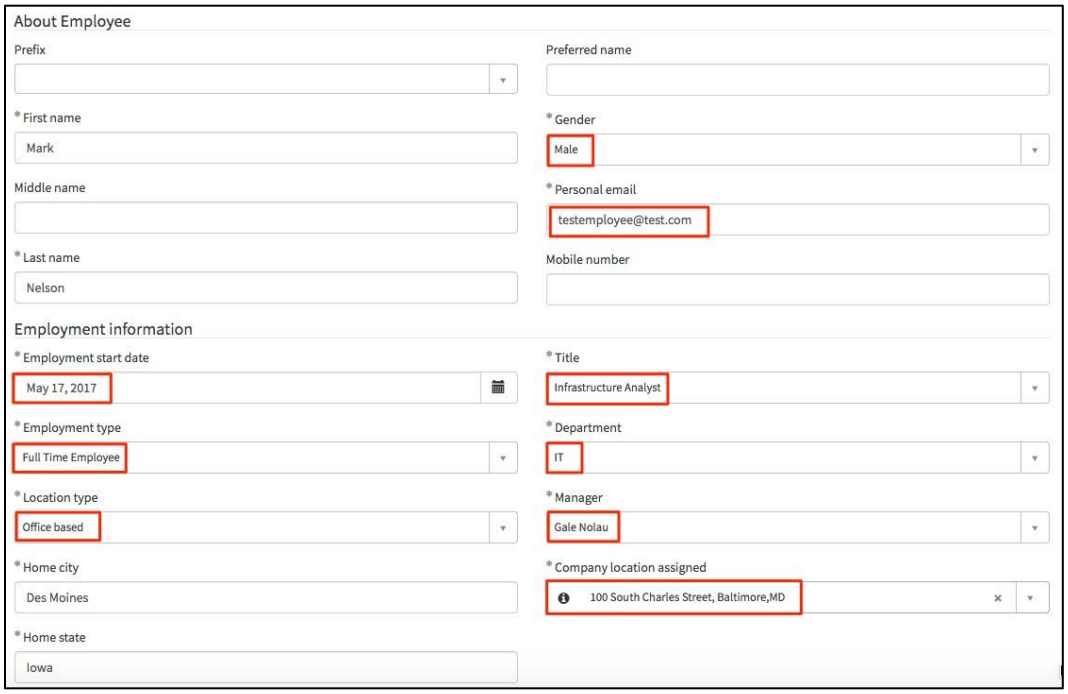


6. Click **Request Onboarding**.



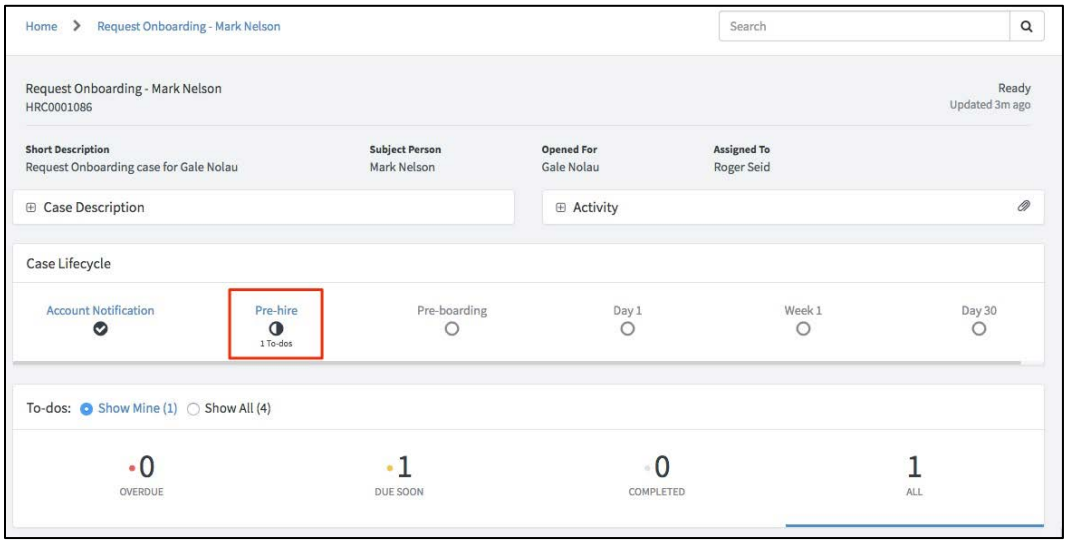
7. Complete the Onboarding Request form with the following information:

   First Name: **Your choice!**
   Last Name: **Your choice!**
   Gender: **Your choice!**
   Personal email: **testemployee@test.com**
   Employment start date: **May 17, 2017**
   Employment type: **Full Time Employee**
   Location type: **Office based**
   Home city: **Your home city**
   Home state: **Your home state**
   Title: **Infrastructure Analyst**
   Department: **IT**
   Manager: Gale Nolau
   Company location assigned: **100 South Charles Street, Baltimore, MD**

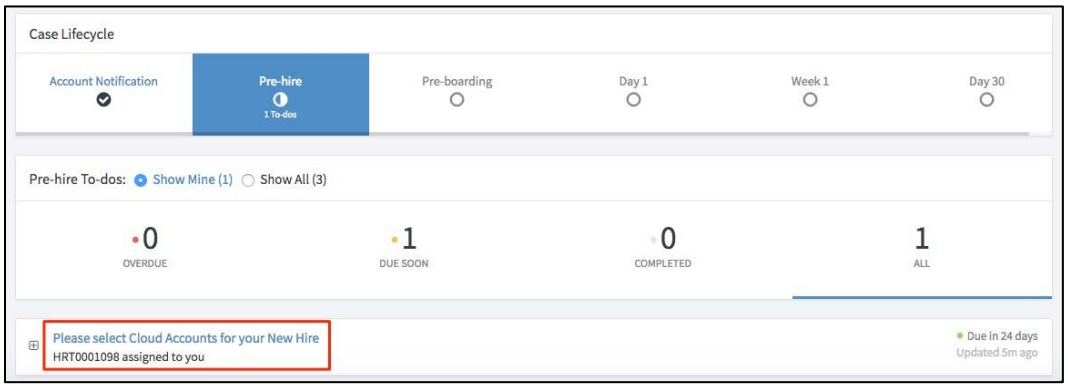


8. Click **Submit.**

9. Navigate to **Case Lifecycle > Pre-hire**.

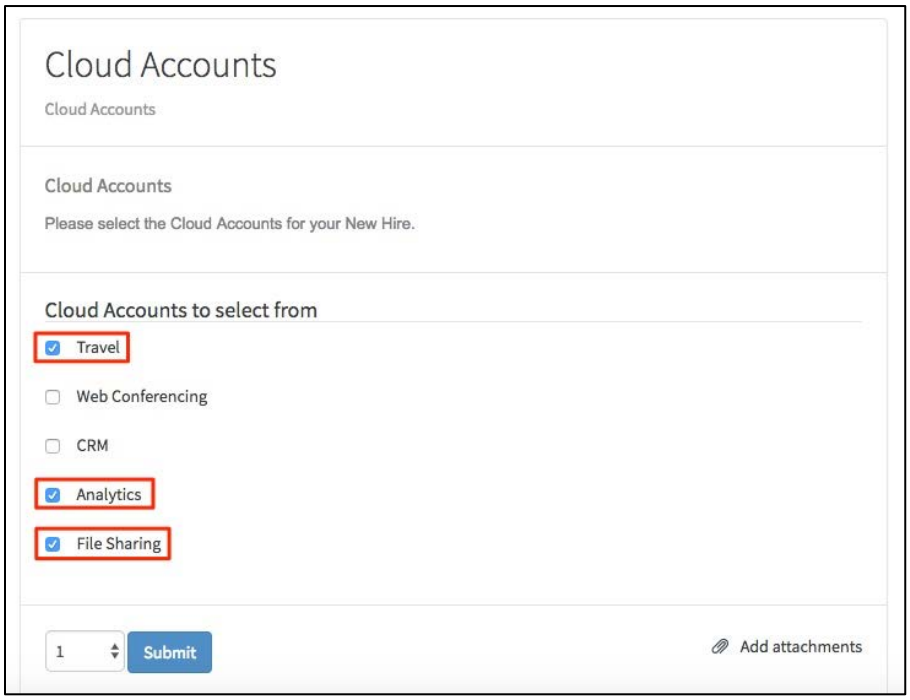


10. Once on the Pre-hire icon, click on the task assigned to Gale. This expands the page to complete the task.



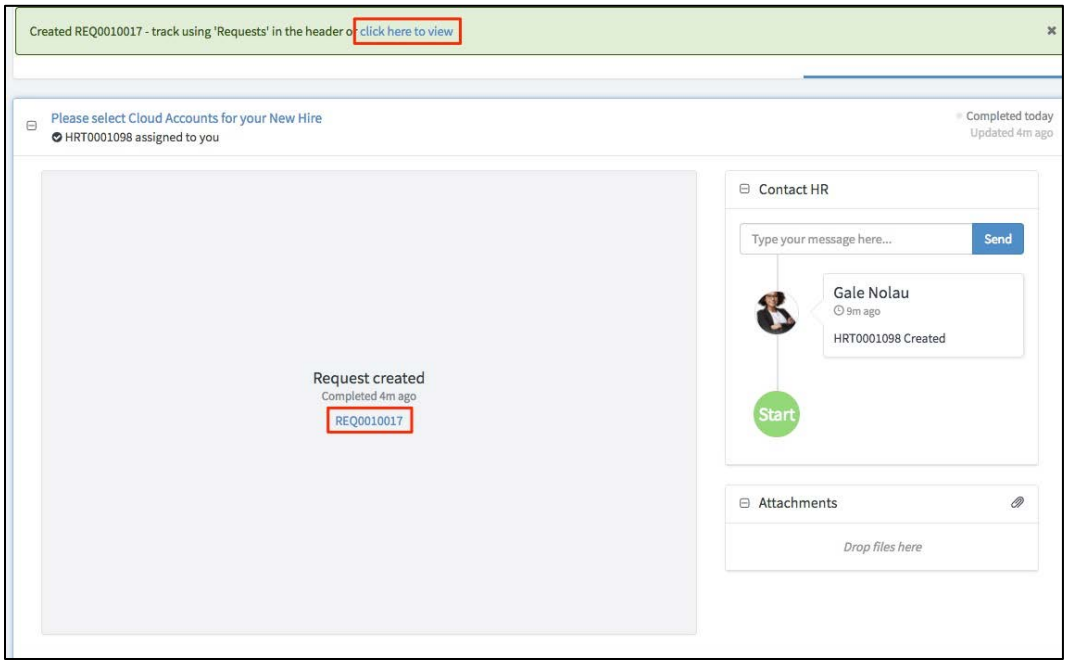
11. Select the following Cloud Accounts:

Travel
Analytics
File Sharing

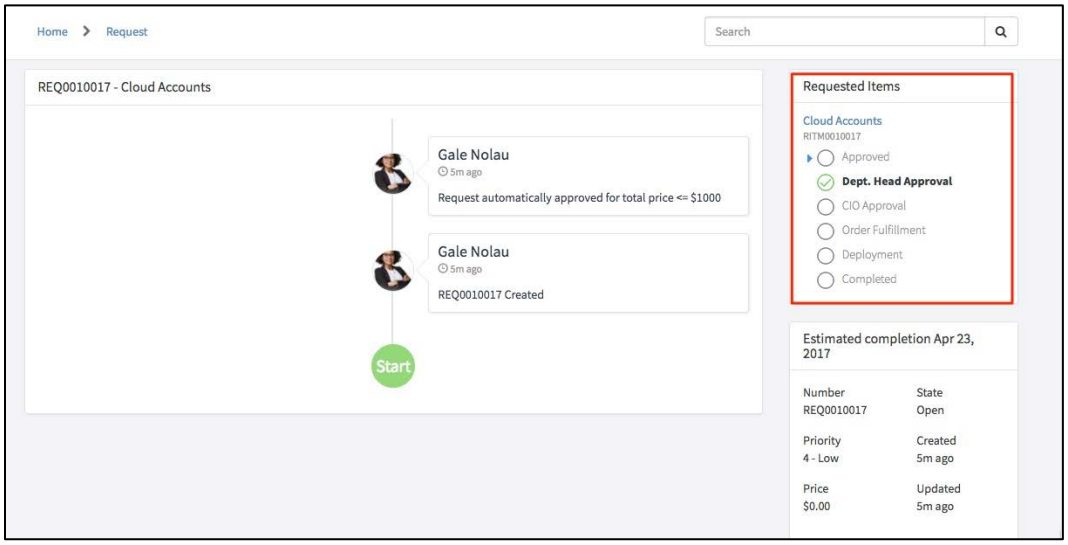


12. Click **Submit.**

13. Click the **Request Number (REQ#)** you created.



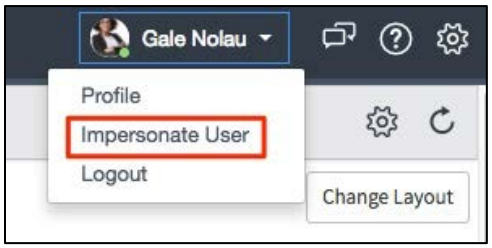
14. Review the Service Catalog Request Item workflow that was initiated.



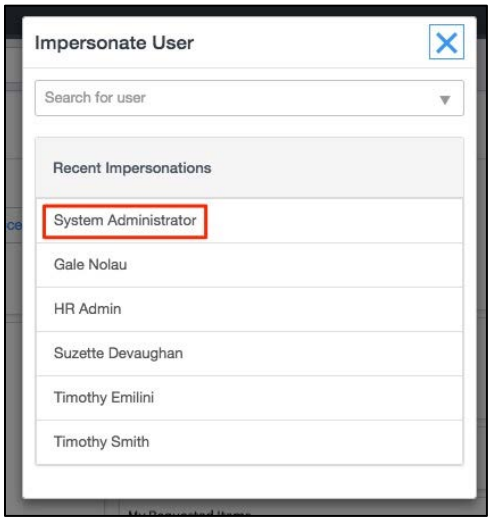
Bonus Steps *if time permits* – Review Service Catalog Requests

1. Navigate back to the standard view as Gale *(the tab you were on before opening the HR Service Portal).*

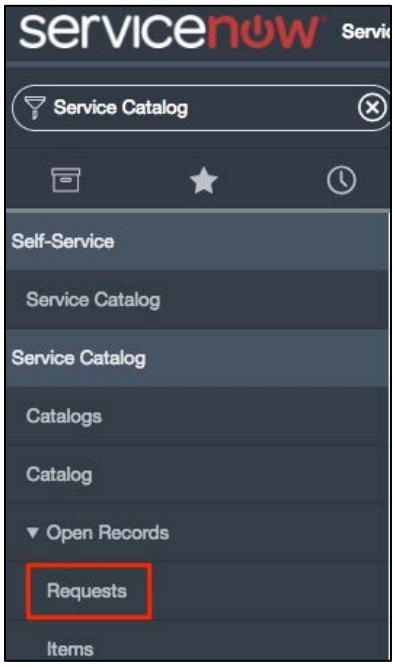
2. From the top-right corner, click Gale's name and select **Impersonate User** from the drop-down menu.



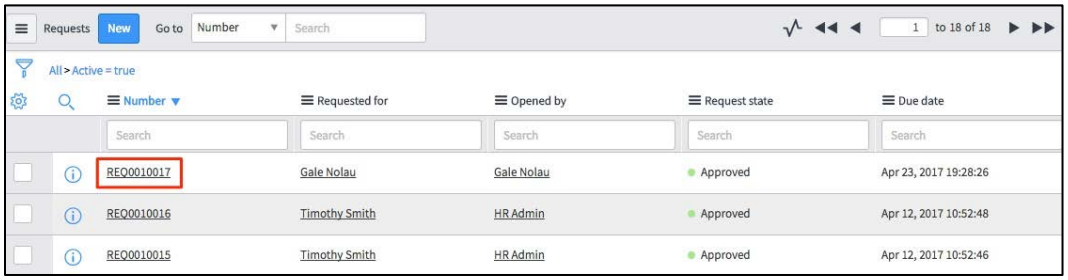
3. Select **System Administrator**.



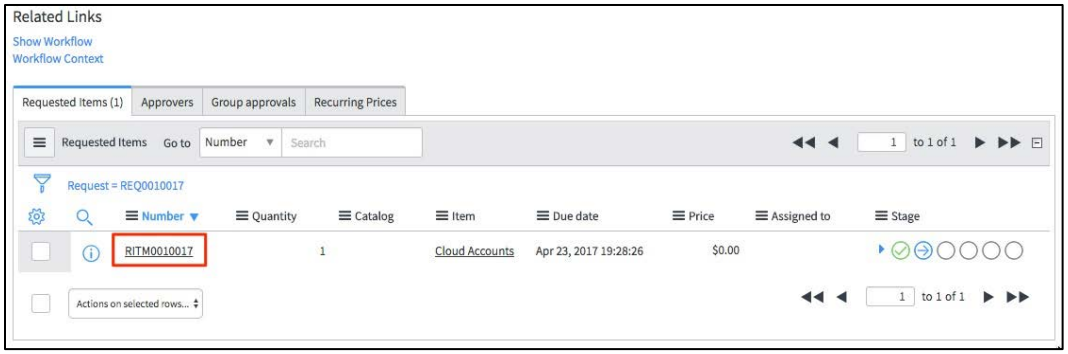
4. Navigate to **Service Catalog > Requests**



5. Notice the Request submitted by Gale is now on top of the list. Click on the **REQ#**.



6. Navigate to **Related Links > Requested Items > RITM#**.



7. Navigate to **Related Links > Approvers**.

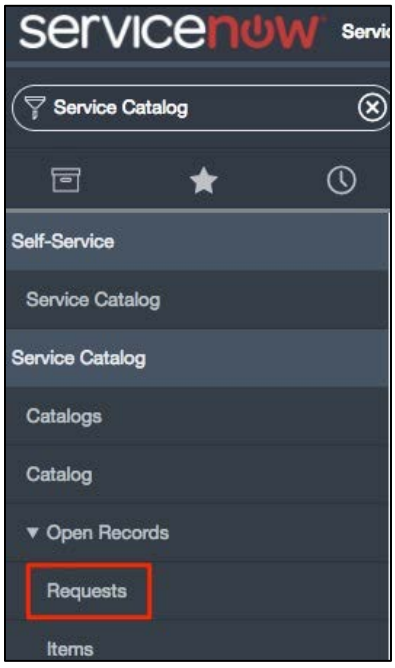


8. Right-click on **Requested** and click to **Approve.**

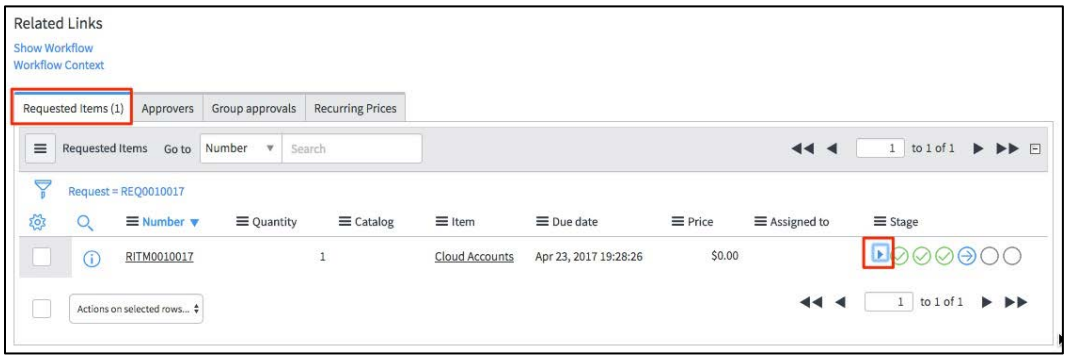


9. Once approved, another Requested state appears with a new Approver. Right-click and **Approve** again.

10. Navigate to **Service Catalog > Requests** and open the same **REQ#** you've been using.



11. Navigate to **Related Links > Requested Items** and **Expand the Stage**.



12. Notice the two additional steps that the stage has progressed with the approvals you processed.



Review

Onboarding requires several actions from business units within the company outside of HR. Today, you learned how to build one of those non-HR activities during our lab. This activity was assigned outside of the HR team to the IT team to review, approve, and provision the appropriate Cloud Accounts to progress the onboarding process; and provide HR insight as to how the onboarding tasks outside of their team are progressing. Now, our new hire has access to the appropriate Cloud Accounts based on their role within the company/business need.

Steps you accomplished:

- Created a new catalog item for the hiring manager to request
- Created a new HR template to reference the catalog item that was created
- The Onboarding Lifecycle Event was then opened and you added the new HR template to the Pre-hire activity set of the Onboarding Lifecycle event
- Tested your new activity by adding a new hire through the HR Self Service Portal
- Reviewed the Request Item
- Bonus: Reviewed the Request Item from an IT Team perspective and progressed the workflow process

Ultimately, you learned to edit and add additional activities that provision requests out to other business units within the organization to complete the many steps of employee onboarding. This allows you to continue to configure your company's onboarding process as it matures over time and requires additional steps.