Lab Guide

Maximizing the Employee Experience with HRSM and Becoming the System of Engagement

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Default Login / Password

hradmin / hradmink17

tim / timk17

sally / sallyk17

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Lab Goal

Lab 1
ServiceNow
HR Solution

The objective of this lab is to familiarize you with what ServiceNow provides out of the box for HR Service Delivery. The lab explores different personas to see what is available for them and follows an onboarding request.

- View the portal as our Candidate Sally
- Complete items and explore the knowledge base
- View reports as an HR manager
- Create and manage reports

Lab Goal

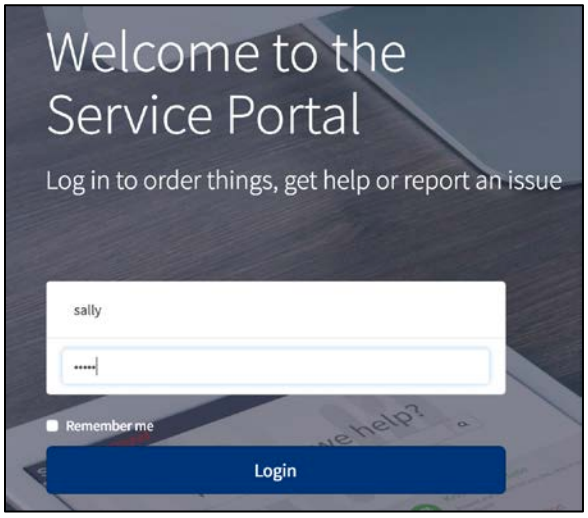
Lab 1.1 The Employee Experience

The objective of this lab is to show you the employee experience. The lab explores the following areas:

- How to log in as a new candidate
- Features available to new candidates
- How to complete tasks

Log into the Instance

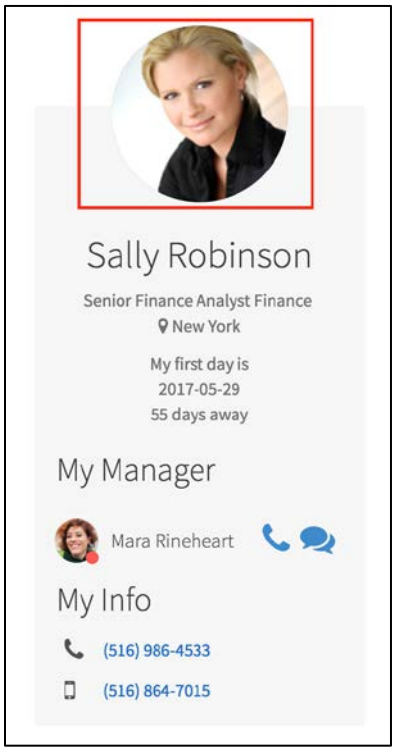
1. Access the instance URL provided at the beginning of the lab.
2. Enter the following at the end of the URL: **/myhr**. The final URL should look something like this: **myinstance.service-now.com/myhr**.
3. Use the following credentials to log on: Username: **sally**, Password: **sallyk17**.



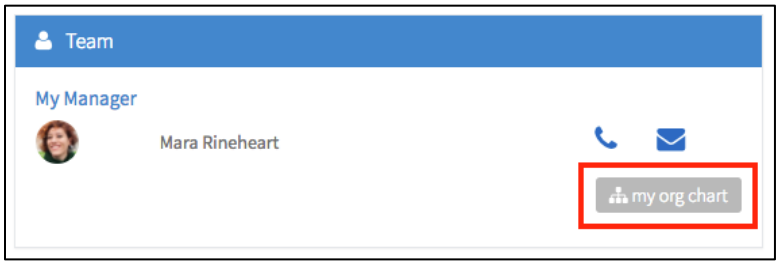
Note: This window logs you into the portal as a new hire candidate. This person has accepted their offer letter and has begun the onboarding process, but has not yet started on their first day. Because of this, access may be limited to certain information of the portal; however, they can complete tasks and search for information to make their transition easier.

Explore the Portal

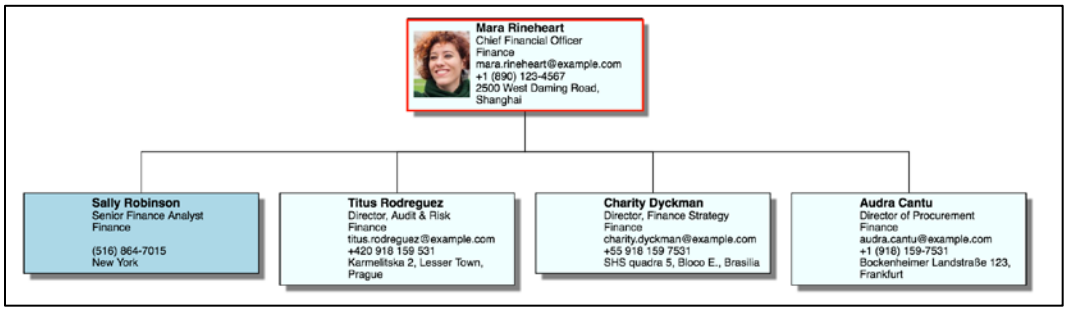
1. Scroll down to view the different options available to Sally.
2. View her information on the left side about her start date and her manager. Click Sally's **Photo**.



3. This screen shows Sally's profile. The profile contains all the important information about her that HR should be aware of. As a new hire, Sally is curious to see how she fits into the company. Click the **my org chart** button on the right side.



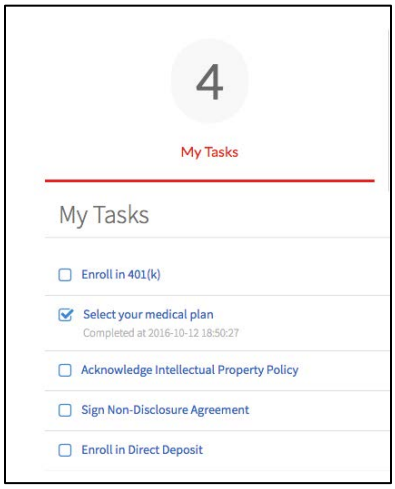
4. **Click the box** that represents Mara, Sally's manager, **Mara**.



5. Once satisfied with the information provided, click the **myHR** logo in the upper-left corner to return to the homepage.

Complete Onboarding Tasks

1. Scroll to the middle of the portal to view the **My Tasks** widget. Sally should have multiple tasks that need work.

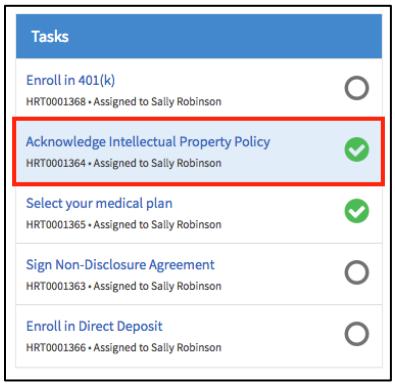


2. Click **Acknowledge Intellectual Property Policy**.

3. View the PDF. When ready, enter **sallyk17** for the password and click **Yes, I agree**.

   Note: This allows new hires to read and sign off on documents online prior to their start date as well as track their status for items needing their attention.

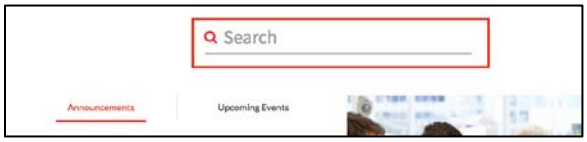
4. Notice the tracker on the left side has updated.



5. Click the **myHR** logo at the top to return to the homepage.

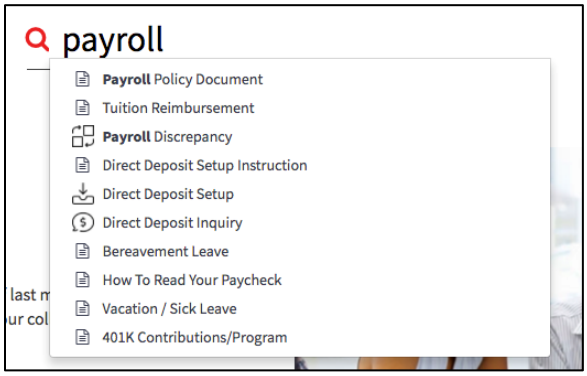
Search for Answers

1. Navigate to the middle of the portal to use the search functionality



2. Search for **payroll**.

3. Notice the different options that are available.



Note: these options are dynamic, based on who you are; for example, as a US-based employee, Sally may have access to a certain segment of documents specific to paychecks in the US.

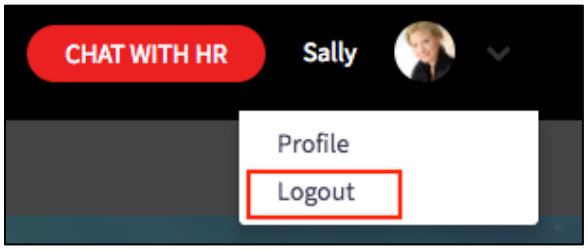
4. Select **tuition reimbursement** and press **Enter**.

5. Select the first choice, **Tuition Reimbursement**.

   Note: this shows the different items relating to those terms. For example, you have the policy that you are about to view as well as the option to engage with HR to submit an inquiry if your question is not answered.

6. View the policy. When finished, click **myHR** to return to the homepage.

7. Click the arrow in the upper-right side and select **Logout**.



Lab Goal

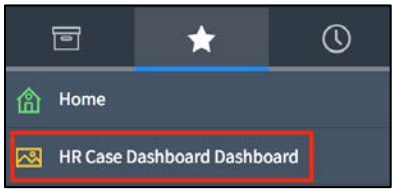
Lab 1.2
The HR Team Experience

The objective of this lab is to show you the experience the HR Team will have managing their work. The lab explores the following areas:

- Manage my work
- Manage my team's work

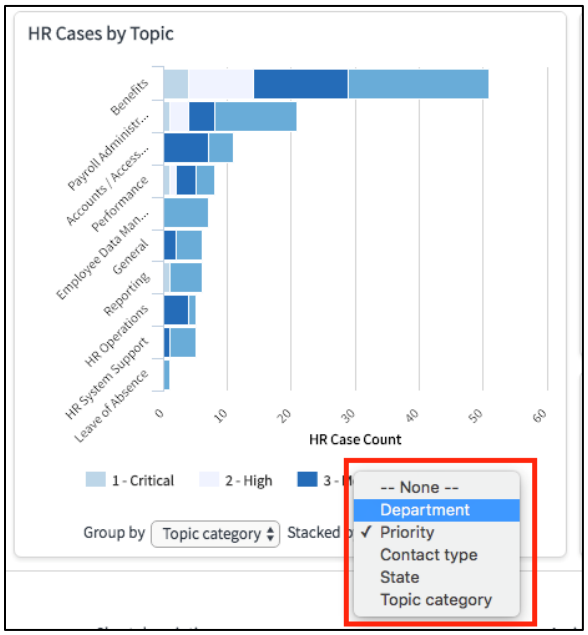
Log into the Instance as an HR Agent

1. Go to your instance URL (e.g., myurl.service-now.com).
2. Use the following credentials to log on: Username: **tim**, Password: **timk17**.
3. Click the bookmark on the left side to find Tim's case dashboard.



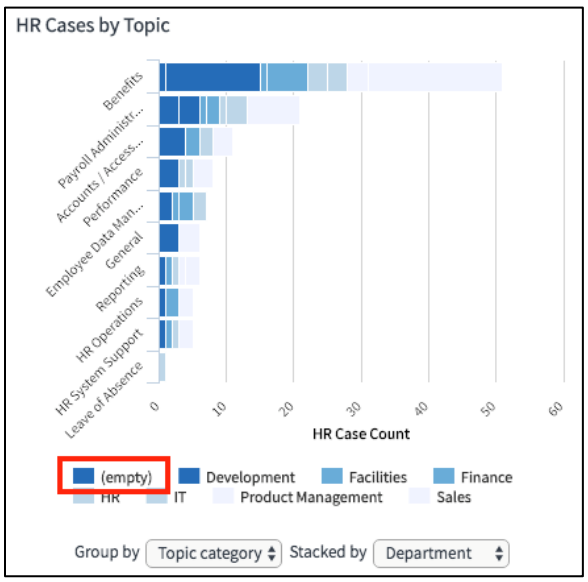
Use the Dashboard

1. View the report **HR Cases by Topic** and change the stacked by selection at the bottom from **priority** to **department**.

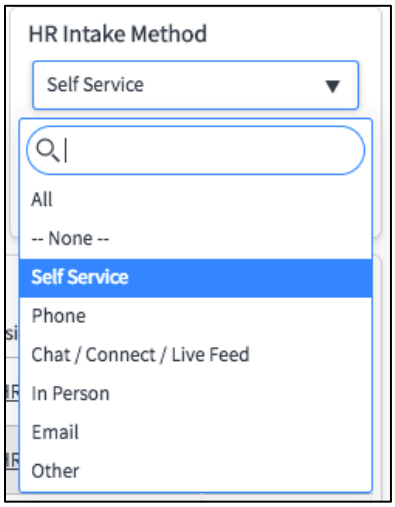


2. Notice how the chart changes to reflect the new filters.

3. Click **(empty)** to remove the low-priority items from the view.

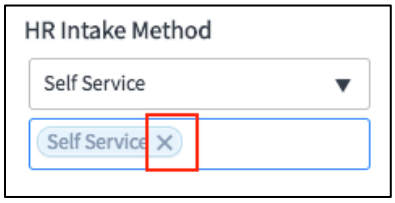


4. Use the filter on the right side called **HR Intake Method** and select **Self Service**.

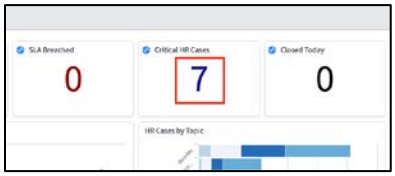


5. View the changes in the dashboard. Notice how all reports have been adjusted based on this selection.

6. Click the **X** next to **Self Service** to remove the filter.



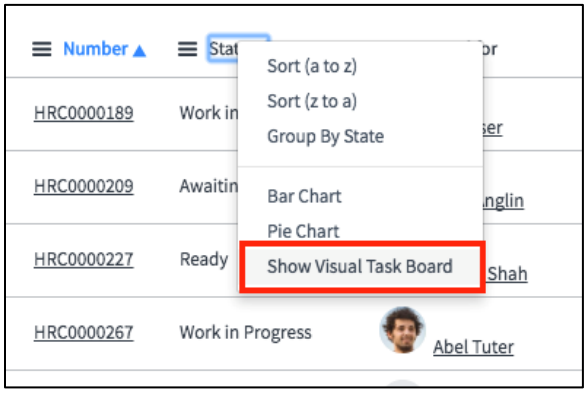
7. Click the **7** in the report called **Critical HR Cases**.



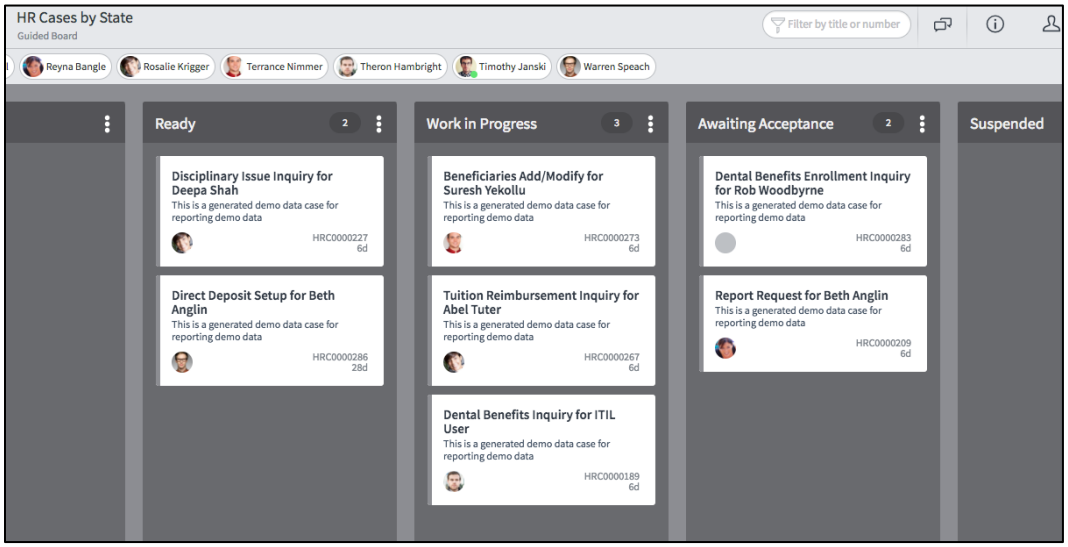
Note: This allows the HR agents to quickly understand what work needs to be done and act on it by simply clicking on the information that interests them. Tim can now click on any of these cases to work on them further.

Create a Visual Task Board

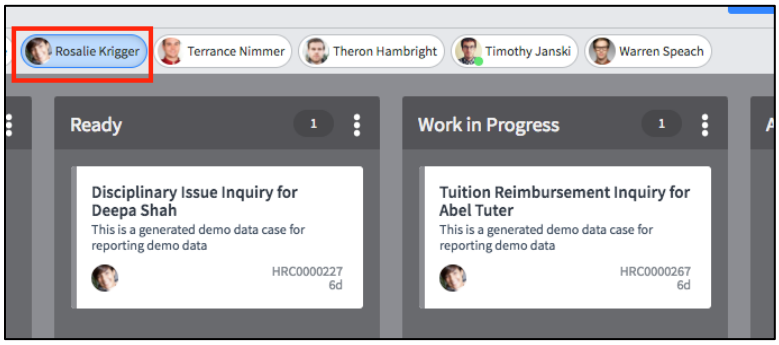
1. Right-click the column header for **State** and select **Show Visual Task Board**.



2. This created a task board for Tim to track the status of these critical requests. Scroll to the right to see the 7 open items in their various stages.



3. Click the icon for **Rosalie Krigger** to view the items she is working on.



Note: Using this view Tim can drag and drop cases into the different stages. He can also re-assign cases by dragging Rosalie's photo onto one of the cases. This view is an easy way for managers and supervisors to understand team workload and offer help.

4. Click the **ServiceNow** icon in the upper-left to return to the homepage.

Lab Goal

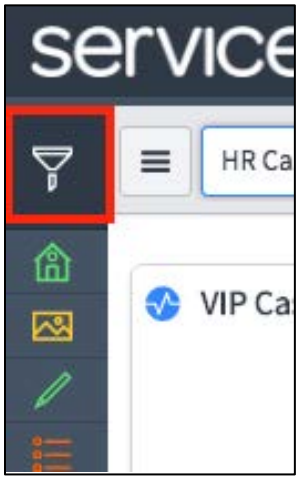
Lab 1.3
HR Reporting

The objective of this lab is to show how reports are created and used to gain insight into team performance. The lab explores the following areas:

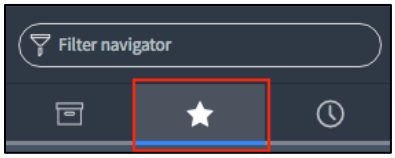
- List views and reporting
- Save and update reports

Case Reporting

1. Open the Navigation bar by clicking the **filter** in the upper-left corner.



2. Click the **star icon** in the middle to view Tim's favorites.



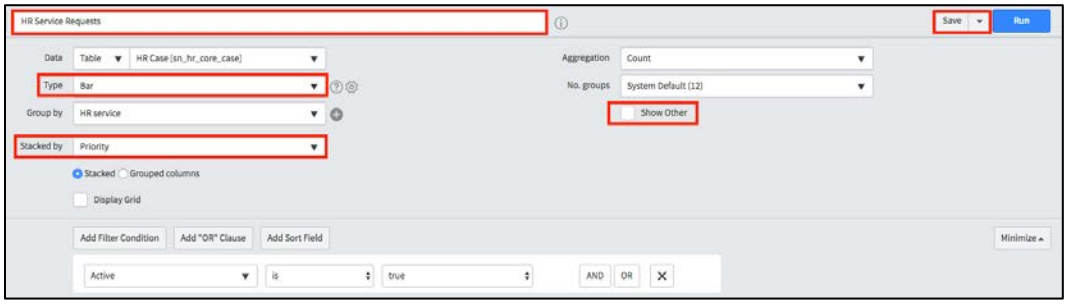
3. Select **Open HR Cases**.

4. To quickly create a report of HR Services, right-click the column header **HR Service** and select **Pie Chart.**



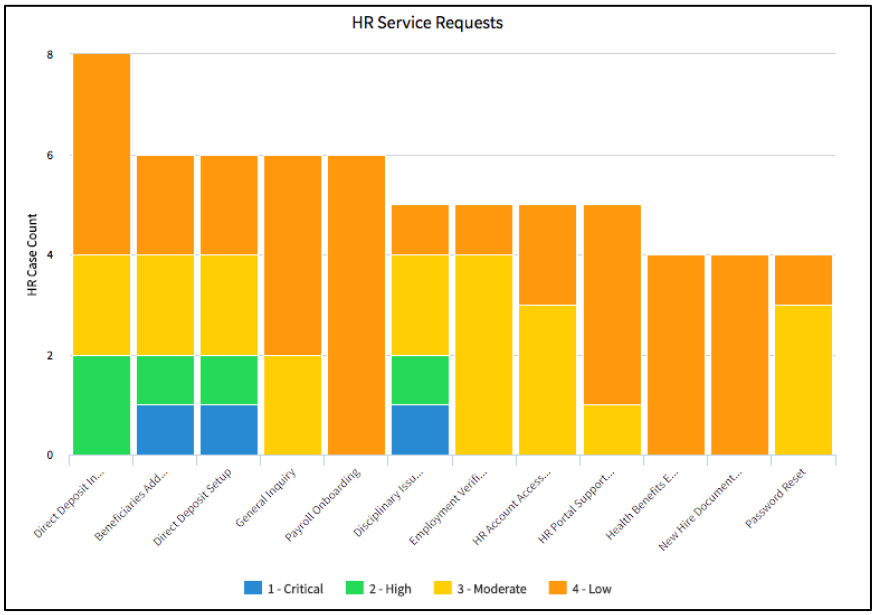
5. Make some small changes to the report to adjust the visual and data set:

   Title: **HR Service Requests**
   Type: **Bar**
   Stacked by: **Priority**
   Uncheck: **show other**

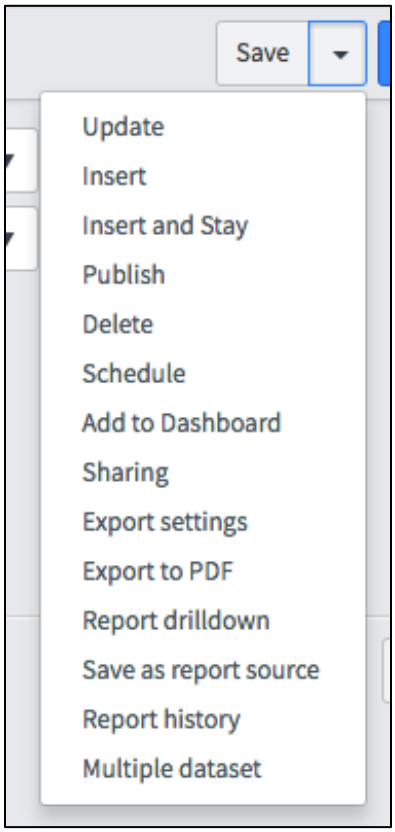


6. Click **Save**.

7. The chart should look like the example below.



8. Click the **arrow** next to the Save button to see the other options available for the new report.



Lab Goal

Lab 2
Make HR Portal Your Own

The objective of this lab is to show you how easy it is to make simple changes to the employee experience portal. This lab explains how to perform the following tasks:

- Understand Service Portal functionality
- Change the logo
- Change the color scheme
- Move and add Widgets

Lab Goal

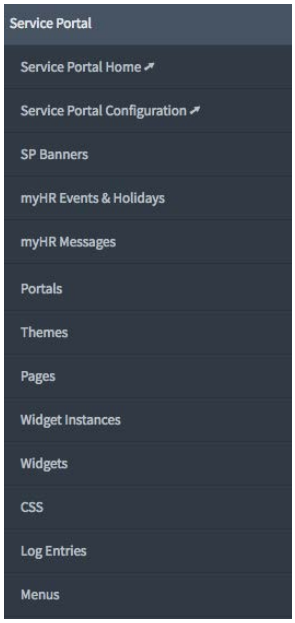
Lab 2.1
Service Portal

The objective of this lab is to introduce you to the ServiceNow Service Portal. This lab explores the following areas in the Service Portal:

- Service Portal in ServiceNow
- Service Portal Page Designer
- Service Portal Usage

Log into the Instance as Admin

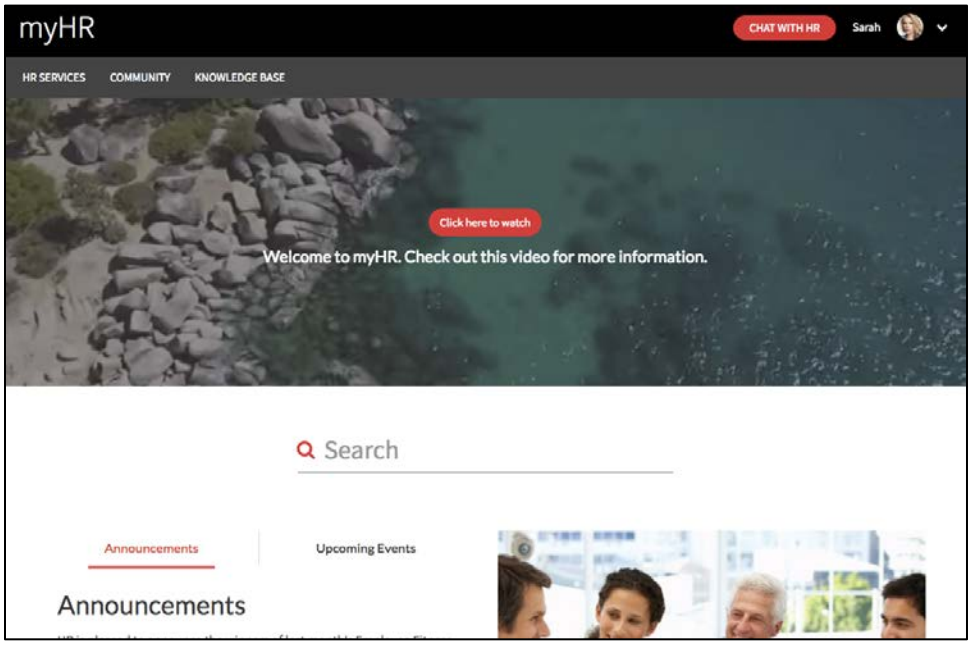
1. Use the following credentials: Username: **admin**, Password: **admink17**.
2. Validate that your admin has the correct roles by navigating to **Service Portal in the left navigation pane**.



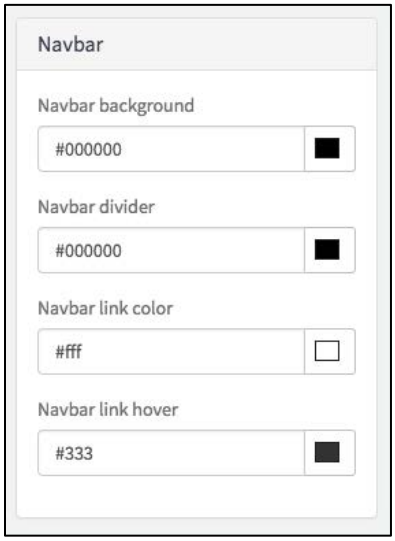
Service Portal in ServiceNow

1. Service Portal is made up of a number of components that made it is to configure. These components include:

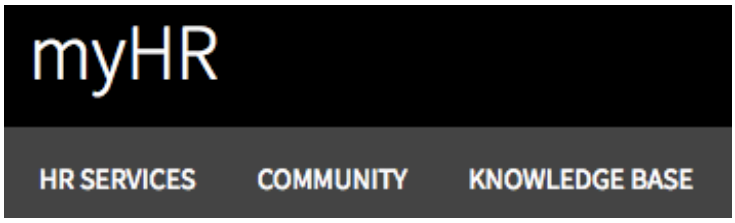
   Index Page – This is the entry point to any portal. You can have as many portals on your instance of ServiceNow.



Themes – Where the colors used for your portal are defined and also the header of footer of your portal pages.



Menus – These define options available at the top of a portal.



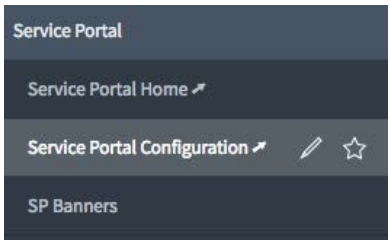
Widgets – A method of presenting data to the user. This could be a simple list view to a scrolling banner or a picture. The example below shows Announcements and Upcoming Events which are records created in ServiceNow.



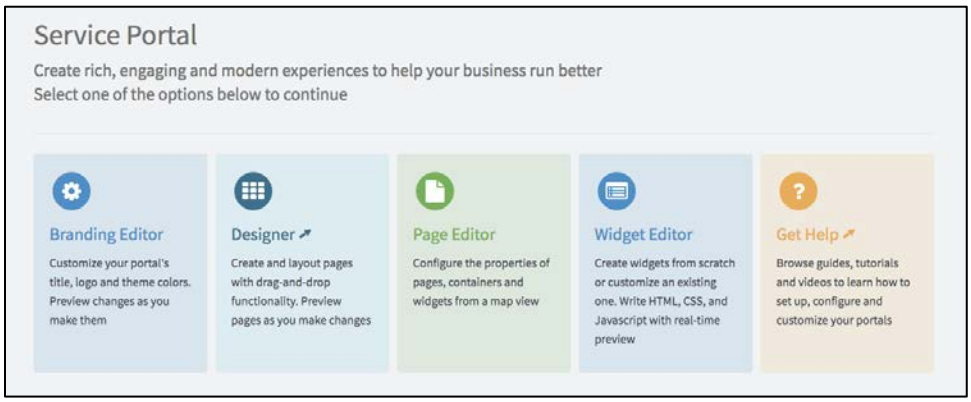
Pages – Different ways of presenting information to the user. This ranges from the login page, welcome page, service catalog page, form page or knowledge base page.

2. This lab does not use all components; however, you do make some changes using the Service Portal Configuration page.

3. Click **Service Portal -> Service Portal Configuration**.

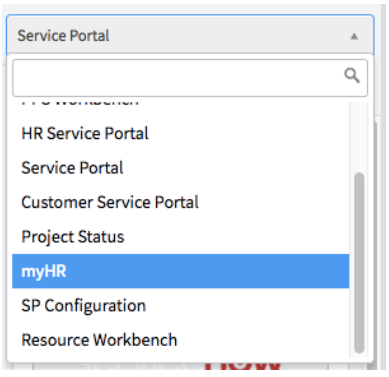


4. The Service Portal Configuration page opens in a new tab.



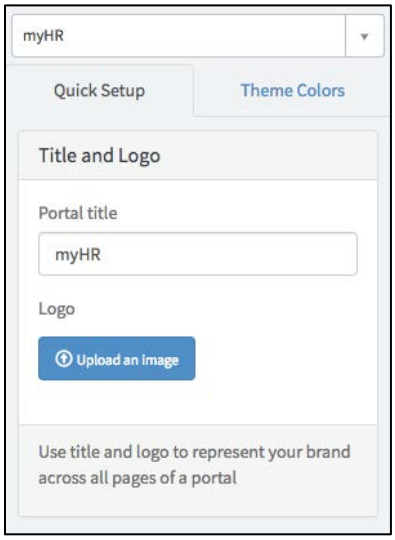
5. Click **Branding Editor**.

6. Select the **myHR** portal if it is not already selected.

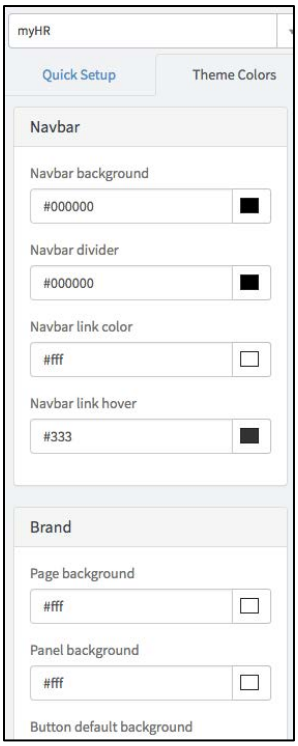


7. This is where you can perform:

Quick Setup – Change the logo

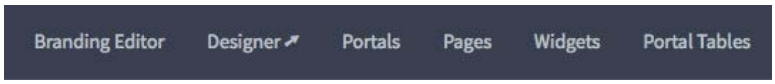


Theme Colors – Change the colors used across the portal; these are the Theme Colors including the background and font colors

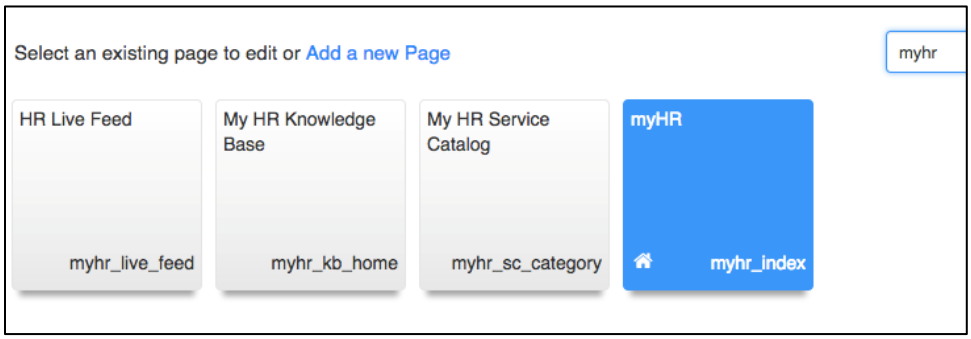


Service Portal Page Designer

1. From the Service Portal Configuration page, click on Designer in the top bar.

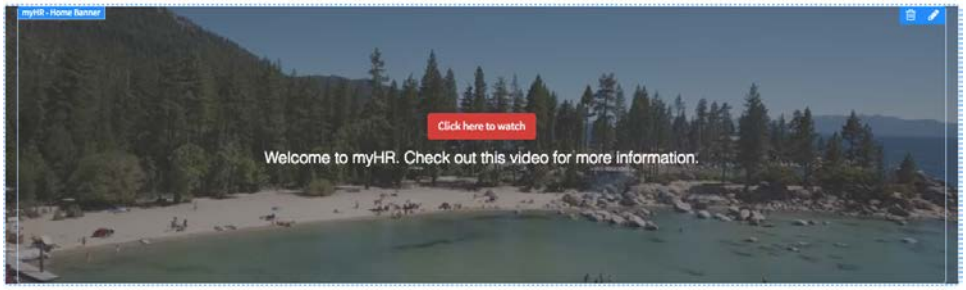


2. Type in **myhr** in the **Filter by title or ID** search field and select the **myhr_index** button.



3. This is where pages are edited. The myhr_index page includes a number of widgets. These are just some of the widgets used for the myhr portal. Hover over each widget to display the name of the widget in the top-left corner.

   Home Banner – This banner can be tailored to match your business or team.



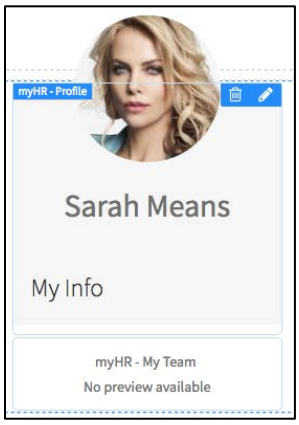
   Typeahead Search – One search field to search for anything in the portal.



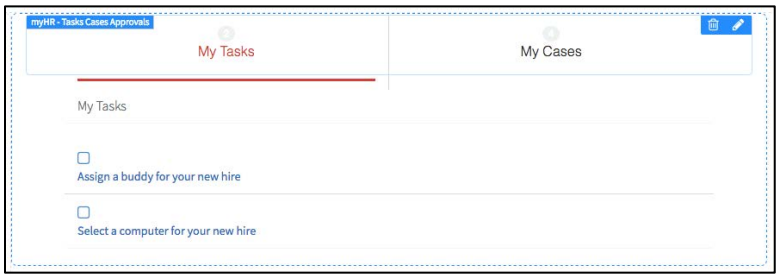
Announcement Events – Display the latest announcements to users or upcoming events.



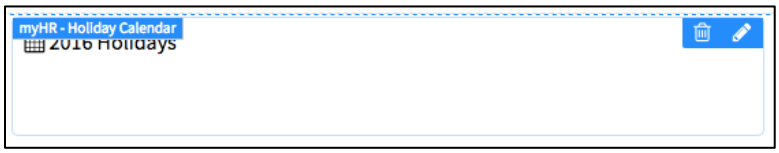
User Profile – The profile of the user logged in.



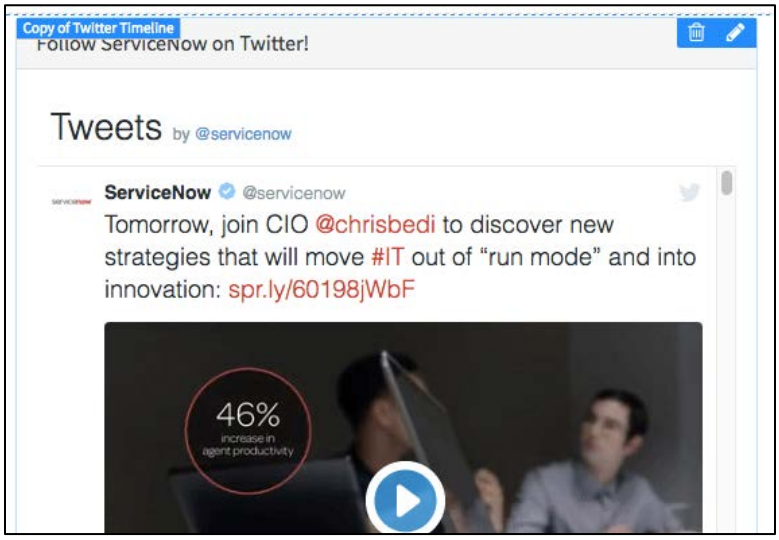
My Tasks and Approvals – Tasks that are assigned to me to complete.



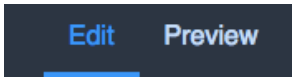
Calendar – This can display information such as public holidays or upcoming events.



Twitter feed – Show feeds from Twitter.



4. Click **Preview** and to test how it will look on different devices.



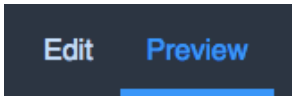
5. You can toggle between a smartphone picture, tablet picture and desktop picture. Try each device. What do you notice?



You can configure what is displayed in the full view and what disappears when there is less real estate (e.g., smartphone).

Layouts and Widgets

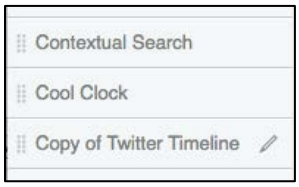
1. Return to the **Edit** view.

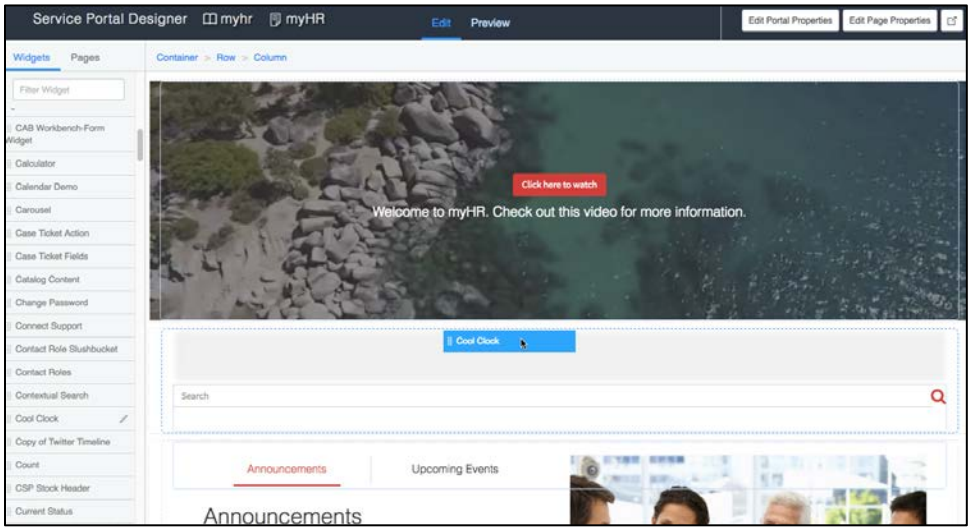


2. On the left side there are two sections; **Layouts** and **Widgets**. The Layouts define how widgets are positioned on the portal and Widgets are the method of publishing data on the portal.

   Layouts how widgets are positioned on the portal. These are standard layout configurations used when creating portals.

Widgets are the different visuals of how data can be published on the portal. Scroll through the widgets to preview what widgets are available. Find the **Cool Clock** widget, and drag the widget somewhere into your portal.



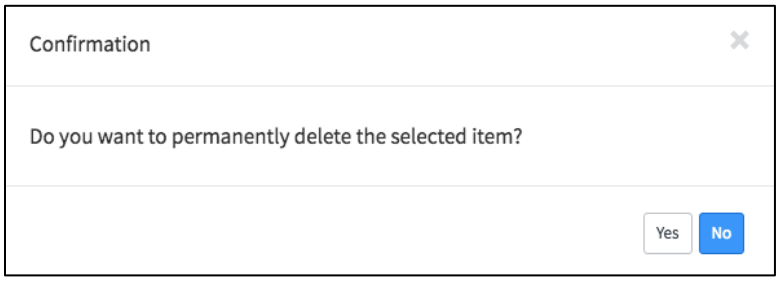


See the Cool Clock now added to your portal.

3. Delete the Cool Clock widget by clicking the bin icon at the top-right of the widget.



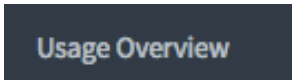
4. Click **Yes** to confirm deletion.



The widget is removed from the portal.

Service Portal Usage

1. Return to the standard user interface and scroll to **Service Portal -> Usage Overview**.



2. A Service Portal Overview dashboard is presented and show the following:

   Which Portal has the most visits
   What are users searching for when using the Typeahead Search field.
   Which Service Catalog is viewed the most
   Which Knowledge Base articles are being viewed the most
   Which Service Catalog Items are being ordered the most

This dashboard shows another added value when it comes to using Portals in ServiceNow. You understand how well used portals are, what are users searching for, and the popularity of knowledge base articles and service catalog. This information can then be used to help HR improve the content presented on the myHR portal and keep the knowledge base up-to-date.

“A portal is only as helpful as the data that is published on it.” Karlo Parulan (ServiceNow).

Lab Goal

This lab explains how to personalize your portal by performing the following tasks:

- Brand your HR Portal
- Apply a different colors to the HR Portal

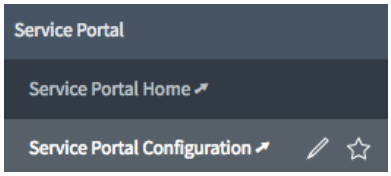
Lab 2.2
Brand the HR Portal

Log into the Instance as HR Admin

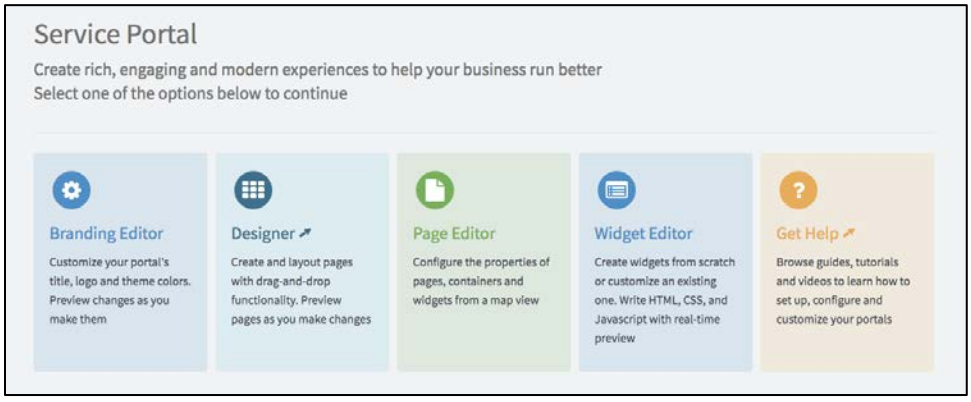
1. Use the following credentials: Username: **admin**, Password: **admink17**.

Brand the Portal

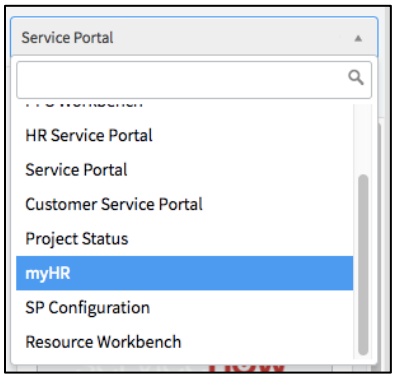
1. Navigate to the Service Portal in the left navigation menu.
2. Click **Service Portal -> Service Portal Configuration**.



3. Click **Branding Editor**.



4. Select the **myHR** portal if it is not already selected.

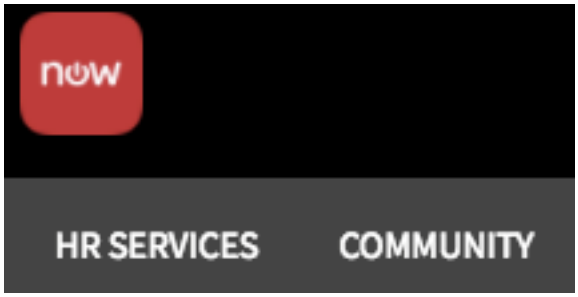


5. To change the logo, click on the **Upload an image** button.



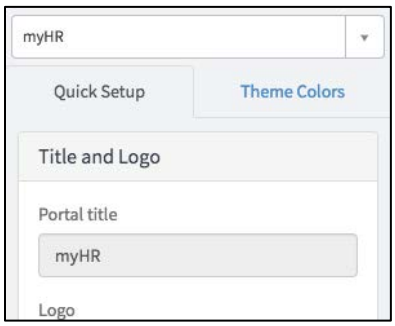
6. Select a logo from one of your folders. If you do not have logo saved, download your company logo. Feel free to use the logo in Knowledge Base articles KB0011111.

   Notice that the logo updates the portal page.



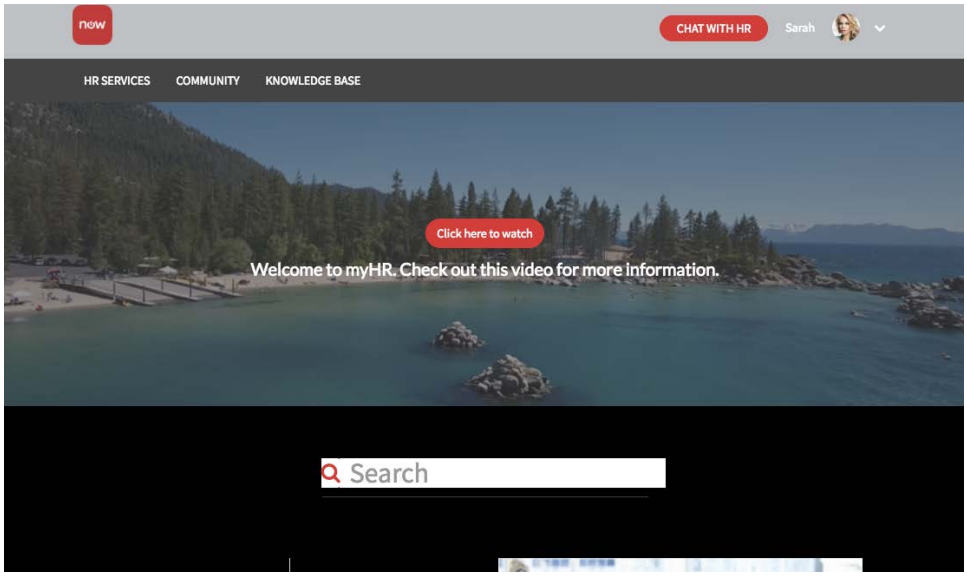
Apply New Color Scheme

1. Click the **Theme Colors** tab.



2. There are three sections in Theme Colors: **Navbar**, **Brand** and **Text**.
   Experiment with the colors by clicking on the current color and selecting a new color. Watch as the portal refreshes with your newly selected colors.

3. Click **Quick Setup** to see the new colors in action. In this example, the header is gray and the background is black. The hover text is red type.



Lab Goal

Lab 2.3 Add and Move Widgets

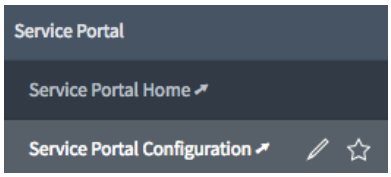
This lab explains how to add and move widgets around the HR Portal by performing the following tasks:

- Move widgets around the HR Portal
- Add new widgets to the HR Portal

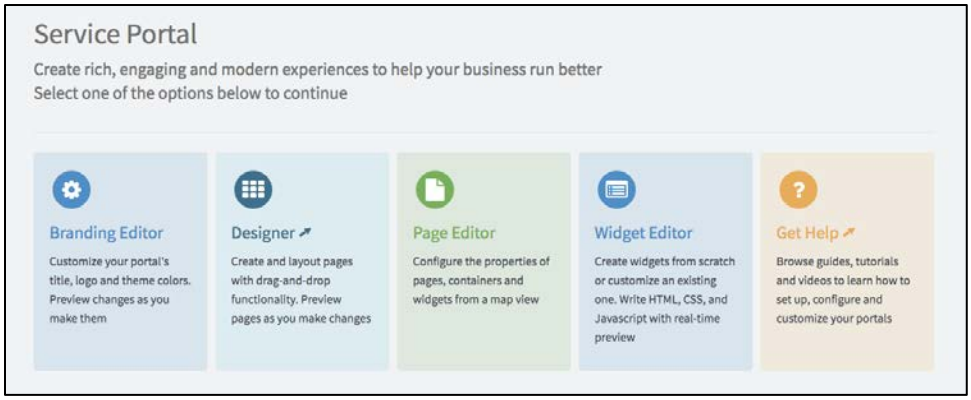
Log into the Instance as HR Admin

1. Use the following credentials: Username: **admin**, Password: **admink17**.

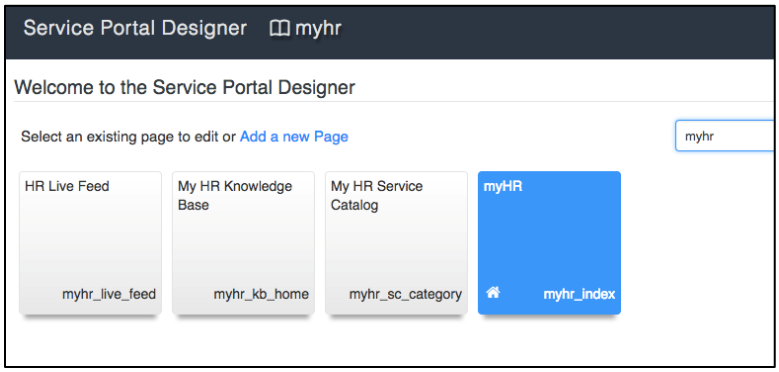
2. Navigate to the **Service Portal Configuration** page. If you have already closed this tab, reopen it from **Service Portal -> Service Portal Configuration** link.



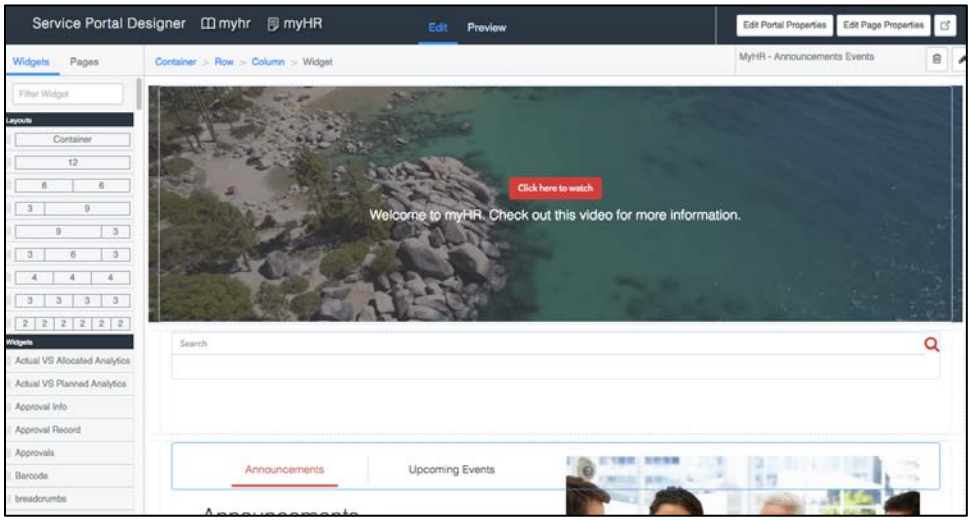
3. Click **Designer**.



4. Search for **myhr** and click the **myhr_index** button.

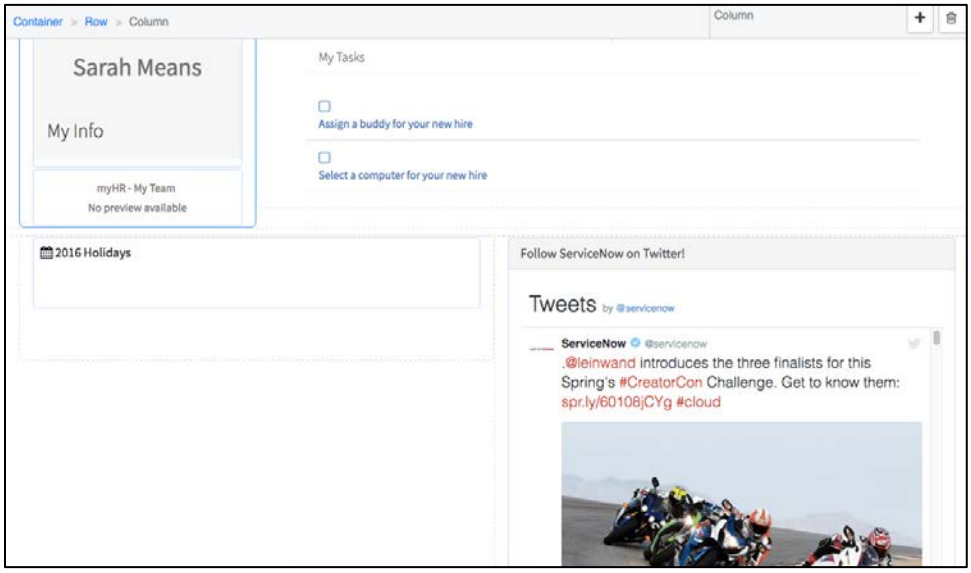


5. The index page is the welcome page when a user logs into the HR Portal. The Designer interface opens.

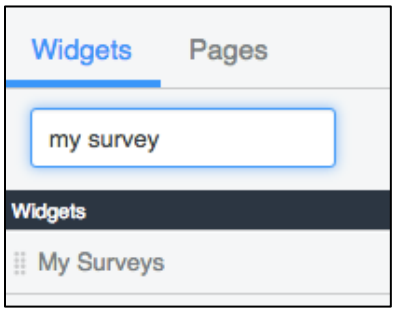


Add Widget to Portal

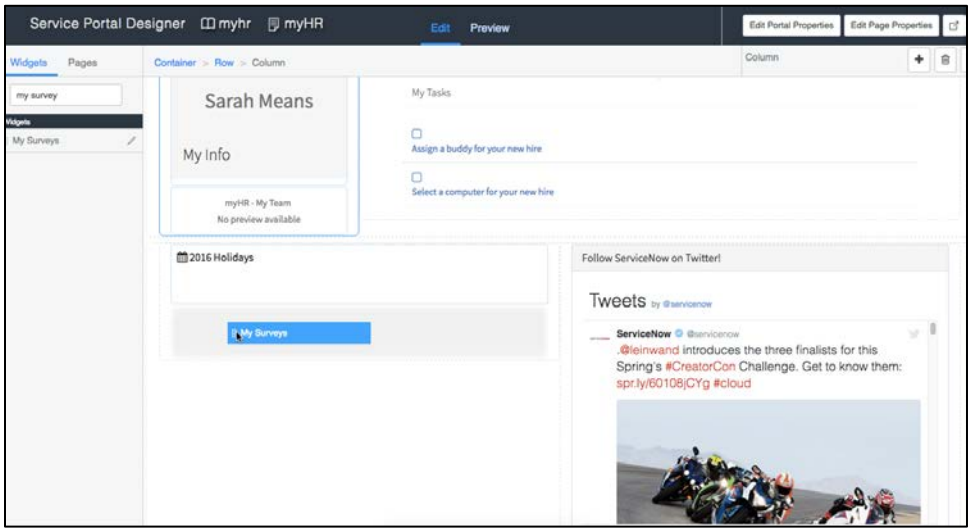
1. Scroll down the portal page to the Calendar and Twitter feed.



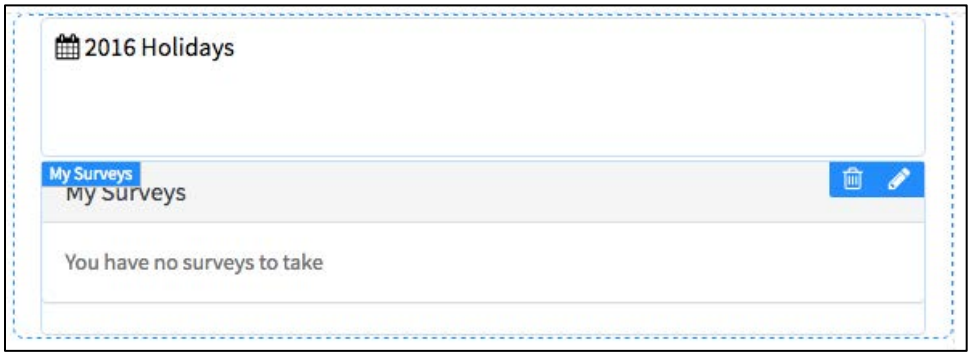
2. Search for **my surveys** in the filter on the left side.



3. Click and drag the **My Surveys** widget and drop below the **201~~7~~6 Holidays** widget.



4. You now have a new widget on the portal.



No surveys are there, but we assign a survey to complete in Lab 4.

Lab Goal

Lab 3 Communicate with Employees

This lab explains how to communicate news or updates to employees. The lab explores the following areas:

- Knowledge base features and functions
- Create your own knowledge for employees
- Publish knowledge base article to HR Portal

Lab Goal

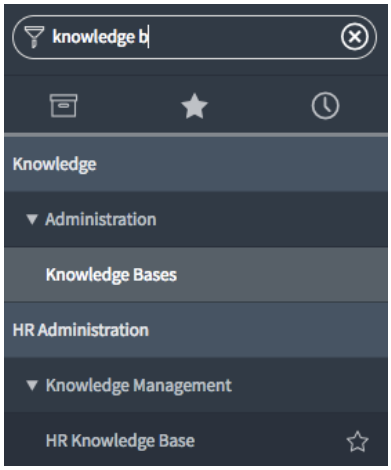
This lab explores the knowledge base feature in ServiceNow by examining the following features:

- Knowledge Bases
- View a Knowledge Base Article
- Review Knowledge Base Article configuration

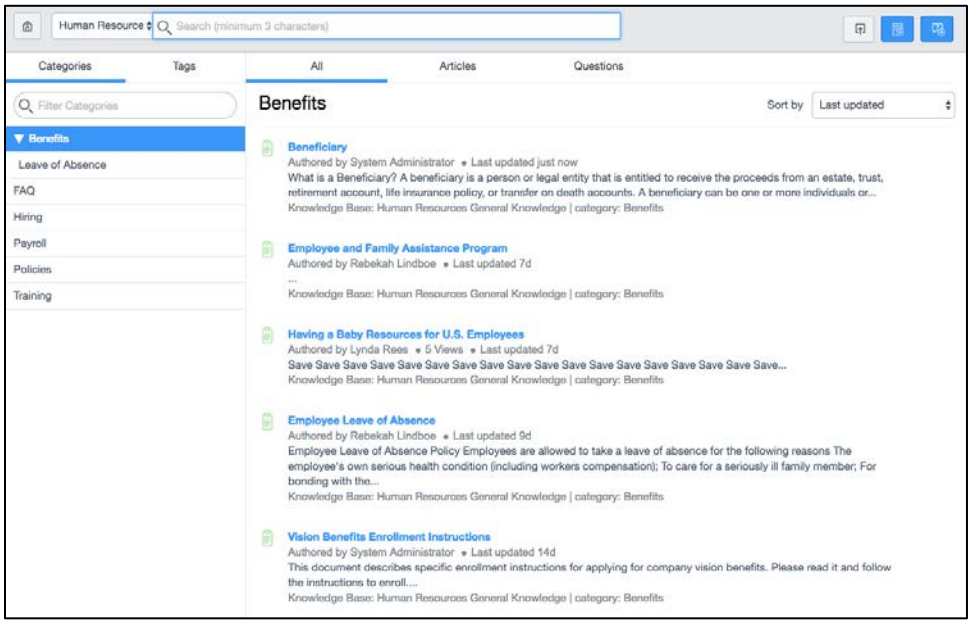
Lab 3.1 Knowledge Base Features

Knowledge Base

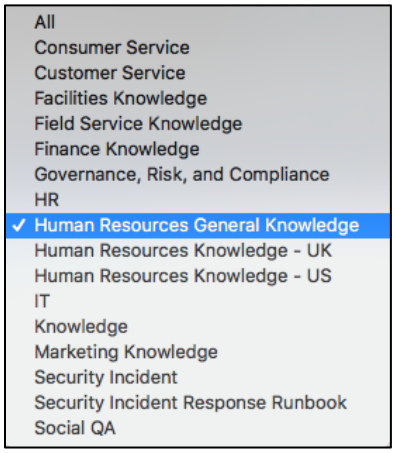
1. Use the following credentials: Username: **hradmin**, Password: **hradmink17**.
2. Navigate to **HR Administration -> Knowledge Management -> HR Knowledge Base**.



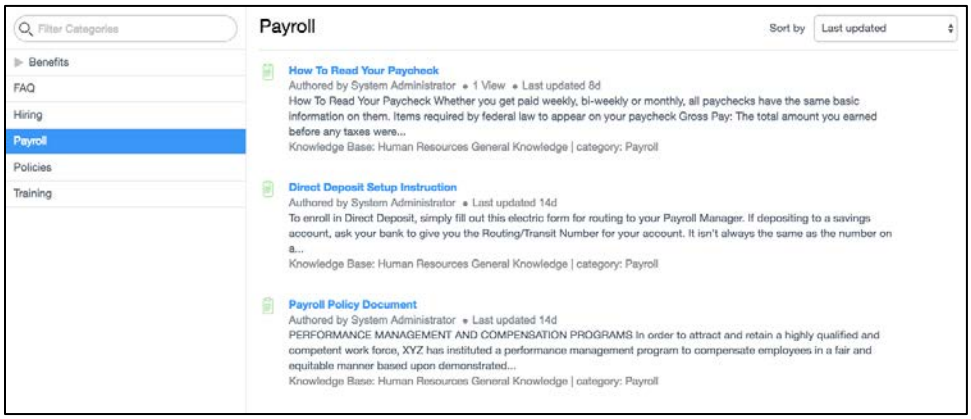
3. The HR Knowledge Base displays.



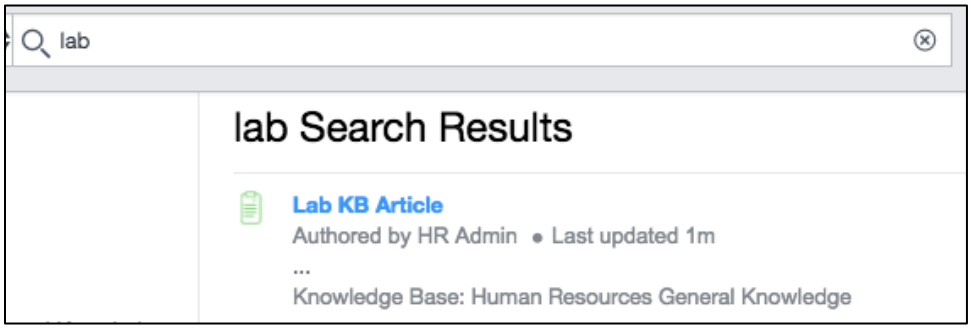
4. There are multiple knowledge bases that can be configured in ServiceNow, not just for HR.



5. Each Knowledge Base can have several Categories configured. Within HR, there are some for Benefits, FAQ and Hiring. Click the **Payroll** category. This filters what knowledge articles are shown.

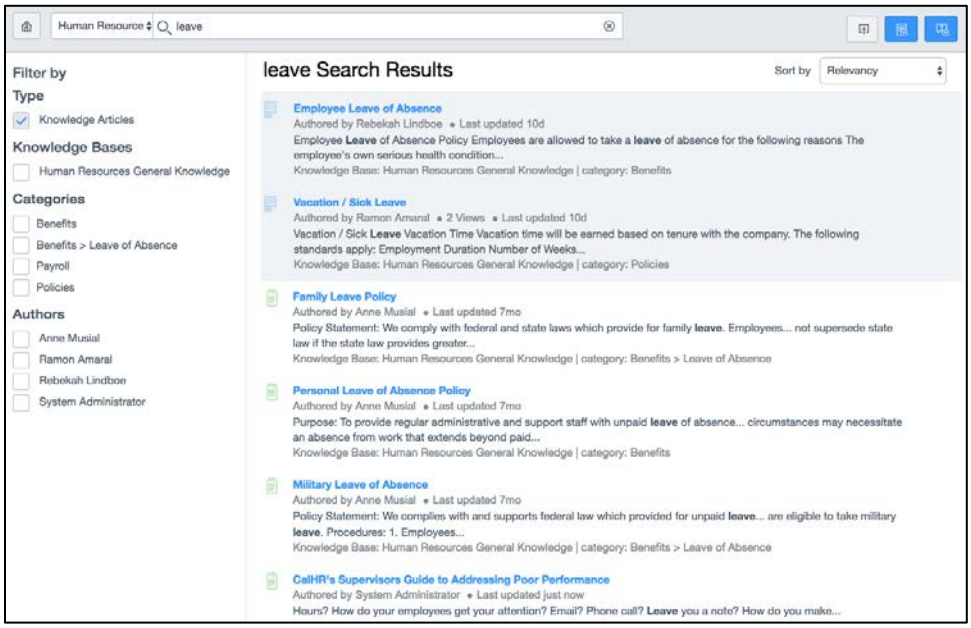


6. Perform a search for **lab** and press enter.



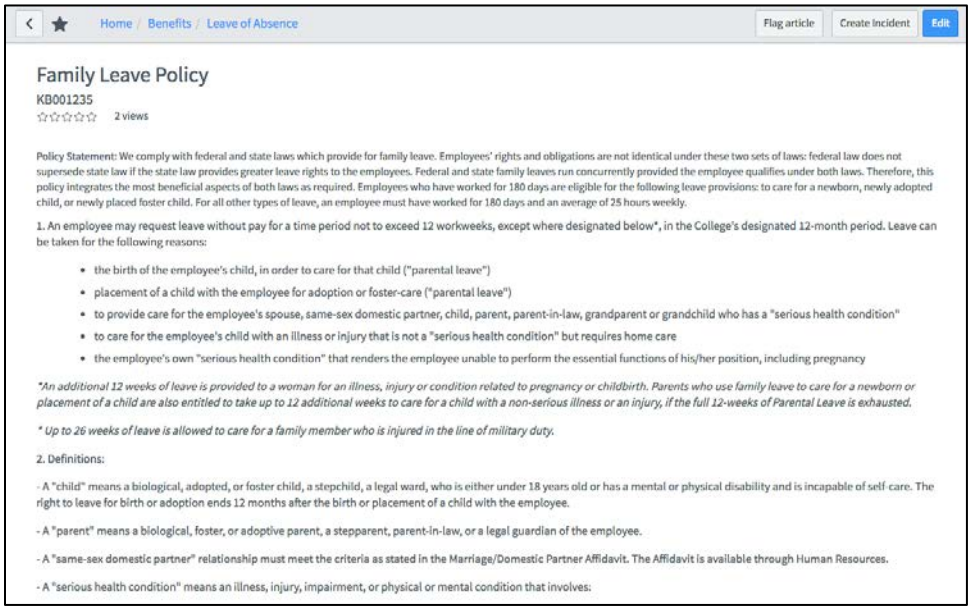
7. Click the **Lab KB Article**. This should trigger the download of a file. This file is used when you create a knowledge base article.

8. Perform a search for **leave** and press **Enter**.



View a Knowledge Base Article

1. Click the **Family Leave Policy** article to preview it.

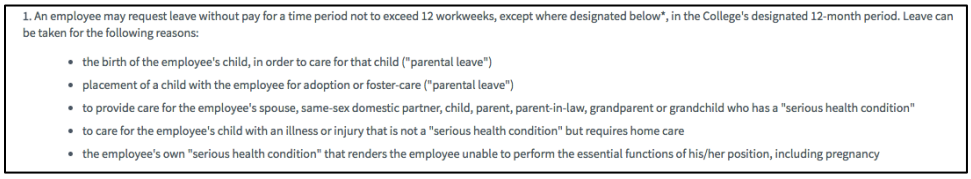


2. This is how articles are presented to users. Key areas:

Rating



RTF – fonts and media (pictures and videos)



Author and **Last Modified Date**

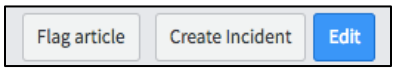


Feedback – Helpful or not and other comments

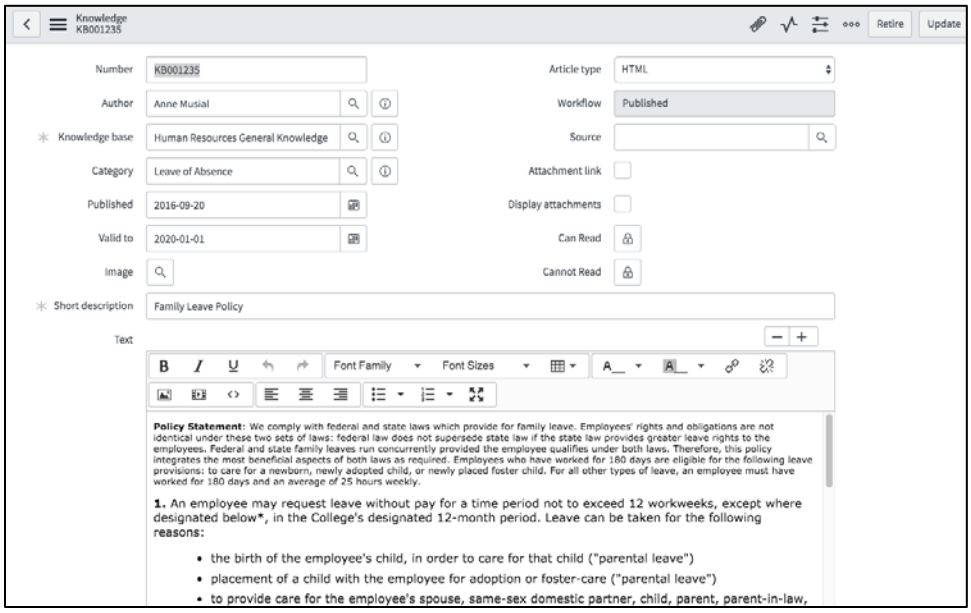


Review Knowledge Base Article Configuration

1. Explore the details of the articles. Click the **Edit** button.



2. The edit view is available only to users with valid permissions.

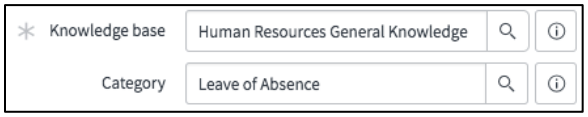


3. Review of the information:

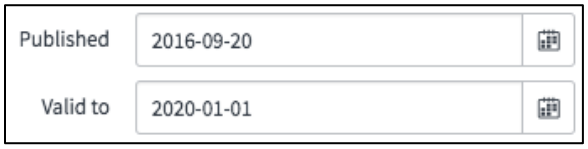
Author



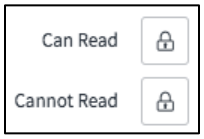
Related Knowledge Base and **Category**



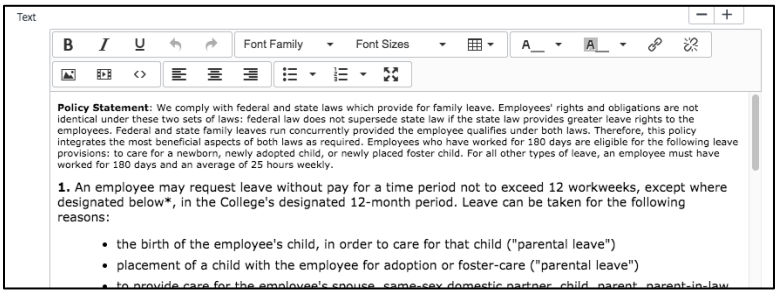
Published and **Valid To** dates



Permissions – who can and cannot read the article



WYSIWYG editor



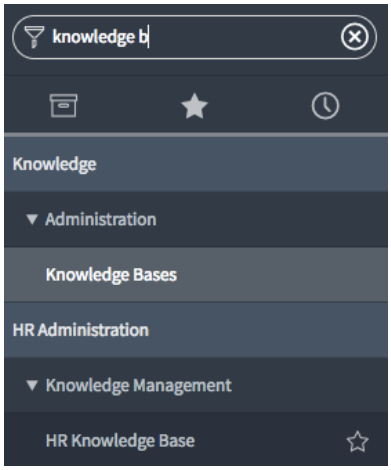
Lab Goal

This lab explains how to create a knowledge base article by performing the following tasks:

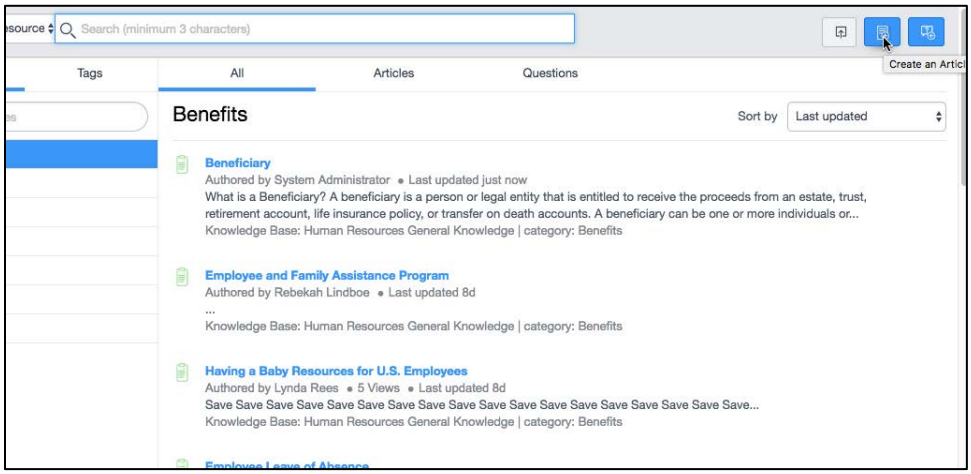
- Create new knowledge base article
- Add media to article
- Publish to HR Portal

Lab 3.2 Create a Knowledge Base Article

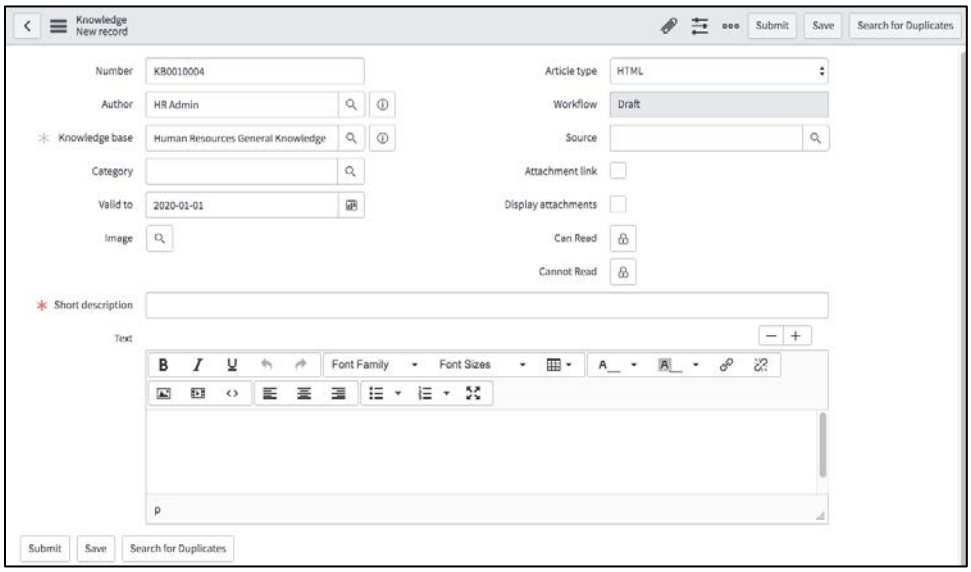
Create a Knowledge Base Article

1. Use the following credentials: Username: hr**admin**, Password: hr**admink17**.
2. Navigate to **HR Administration -> Knowledge Management -> HR Knowledge Base**.
3. 

4. Click the **Create an Article** button.



5. Notice that some information is already populated, such as the Author and Knowledge base, because you are logged in as the HR Admin.



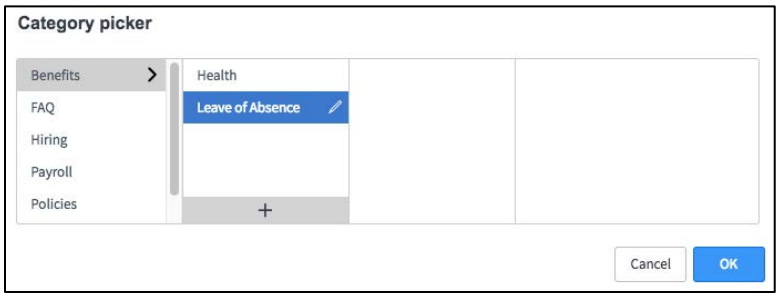
6. Click on the magnifying glass next to the Category field.



7. The Category picker displays. Notice that you can have as many category levels as you need.



8. Click **Leave of Absence**.



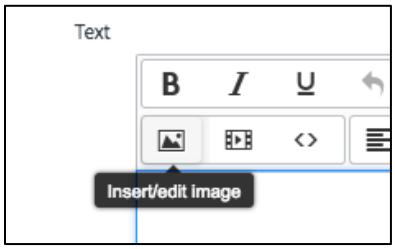
4. Notice that a **+** symbol appears. You can add further categories in this view.

9. Click the **+** and type **Events**. Click **OK**. You return to the knowledge base articles and the Category is set to **Events**.



10. Enter **Knowledge 18** in the Short description.

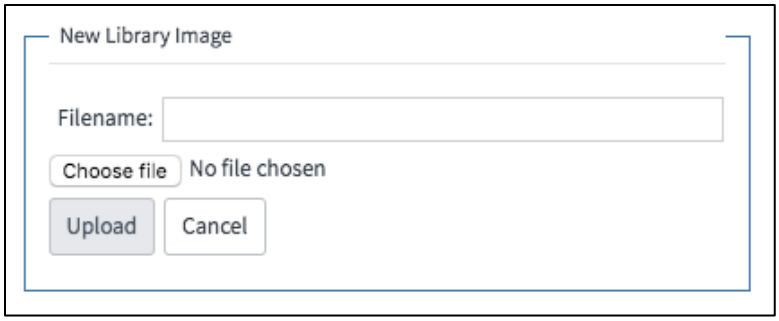
11. Click the **Insert/Edit** Image icon.



12. Click the **New** button.

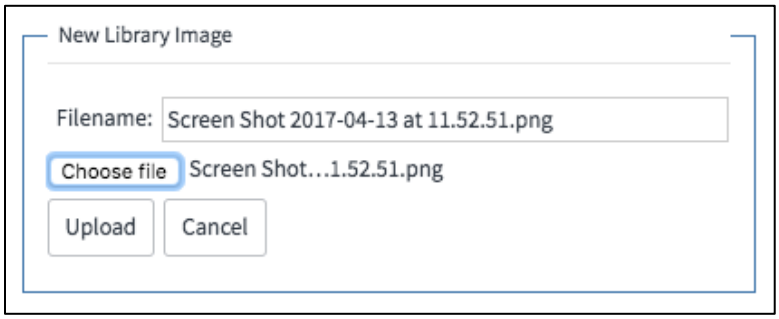


13. Click **Choose File**.

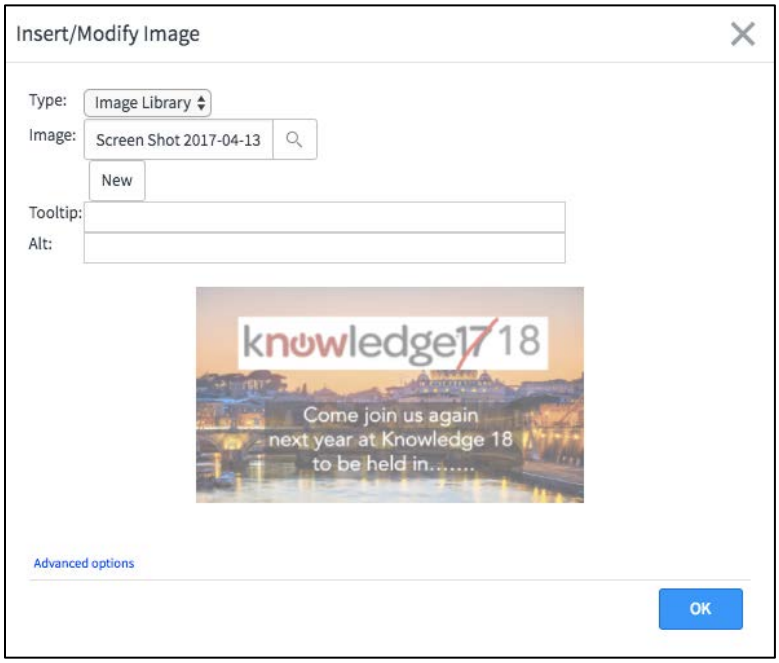


14. Find the file downloaded earlier from the **Lab KB Article** in a previous lab. Select it.

15. Click **Upload**.

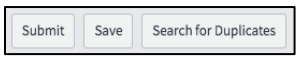


16. Click **OK**.



17. You return to the knowledge article with the picture added.

18. Click **Save**.



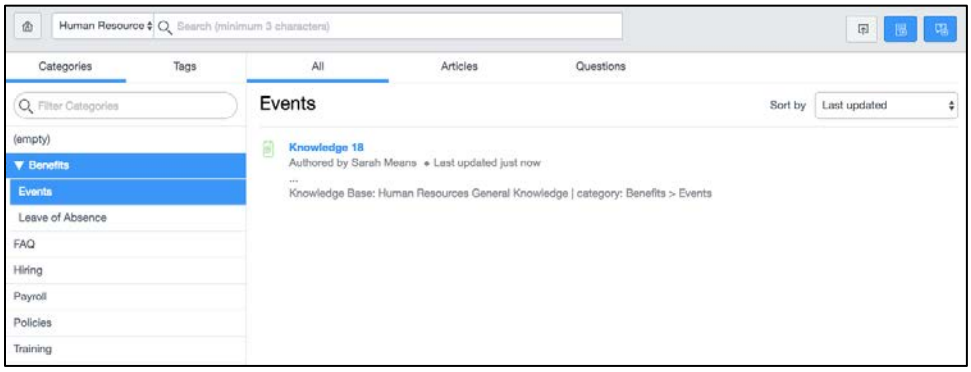
Publish Articles to Portal

1. To ensure articles are made available to users, the last step is to publish the article.
   Note: An approval process or review process can be initiated before publishing articles.

2. Click **Publish**.



3. You return to the HR Knowledge Base page. Select **Events**, under **Benefits**. The new article is now listed.



Lab Goal

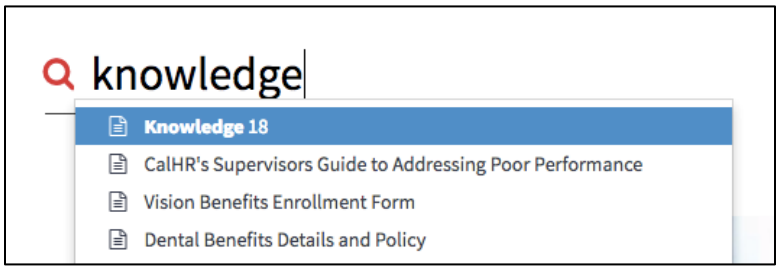
Lab 3.3 Access New Knowledge Base Article

This lab explains how to consume the knowledge base article by performing the following tasks:

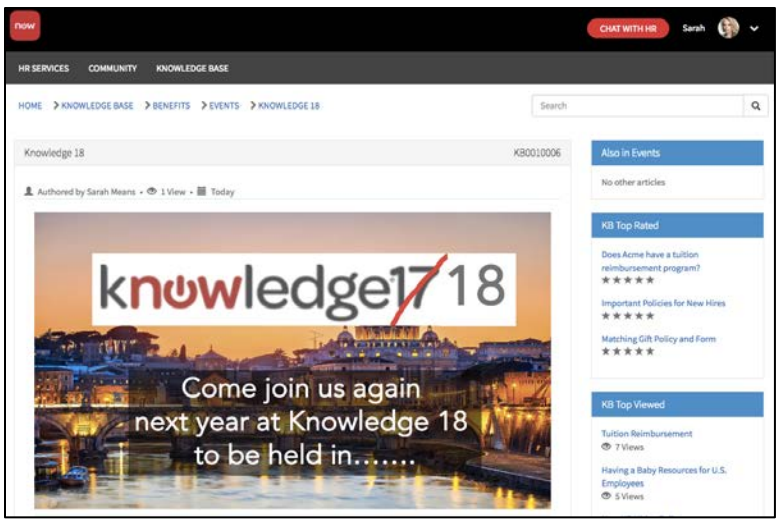
- View knowledge base article via HR Portal
- Provide feedback on knowledge base article

Log into the Instance as Sally

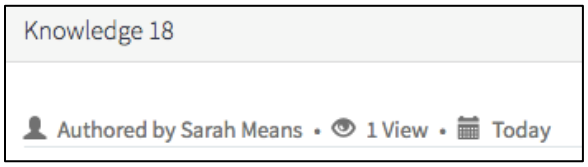
1. Open a new tab or browser and go to <**your instance name>.service-now.com/myhr**.
2. Log in using the following credentials: Username: **sally**, Password: **sallyk17**.
3. Search for **knowledge** in the Search field.



4. Select **Knowledge 18**.



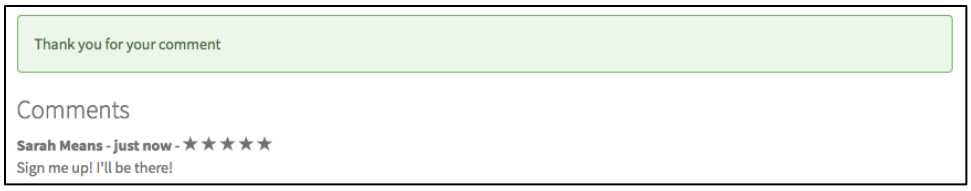
5. Notice the author, views, and modified date at the top.



6. Scroll to the bottom of the articles and add some comments and rate the article.



7. Click **Submit**. Your comments and rating are acknowledged.



Lab Goal

This lab explains how to leverage surveys (a platform feature) to get feedback from employees. Surveys are generally used at the resolution of issues or enquiries, but this lab looks at getting employee feedback about their first week on the job. The lab explores the following areas:

- Surveys in ServiceNow
- How to create a survey
- How to publish a survey to HR Portal

Lab 4
Get Feedback from Employees

Lab Goal

Lab 4.1
Surveys in ServiceNow

The objective of this lab is to understand surveys in ServiceNow. The lab explores the following areas:

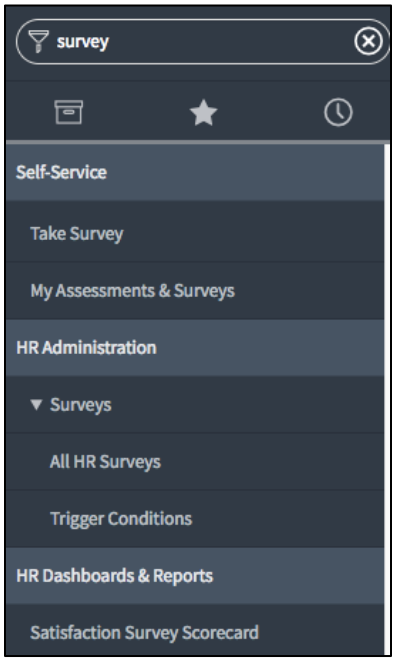
- Surveys in ServiceNow
- Edit a Survey

Log into the Instance as HR Admin

1. Use the following credentials: Username: hr**admin**, Password: hr**admink17**.

Surveys in ServiceNow

1. Search for **survey** in the left navigation pane.



2. The Survey application is a platform feature in ServiceNow that is commonly used to received feedback at the resolution or completion of an incident or request. However, survey functionality can be extended for other purposes such as rating Demand requests or rating Vendor performance.

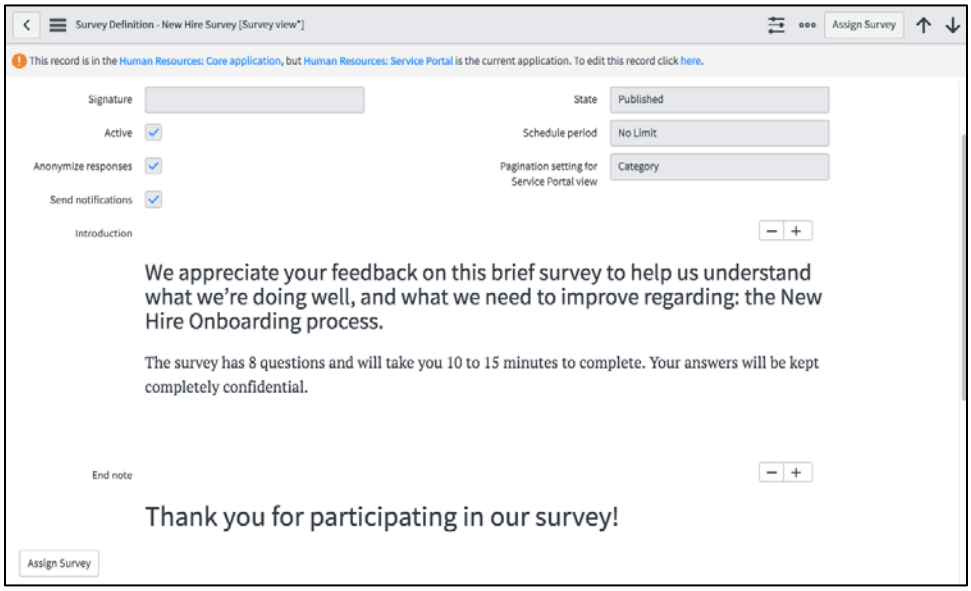
   A survey could be used to also gather feedback from new starters: how was their first day, first week; and also ask them how the process can be improved. In this lab you edit a survey and publish for a user to complete.

3. Click **View Surveys**.

4. Find the **New Hire Survey** and click on it.



5. The survey details appear.



6. **Edit** function.



7. Some survey attributes include:

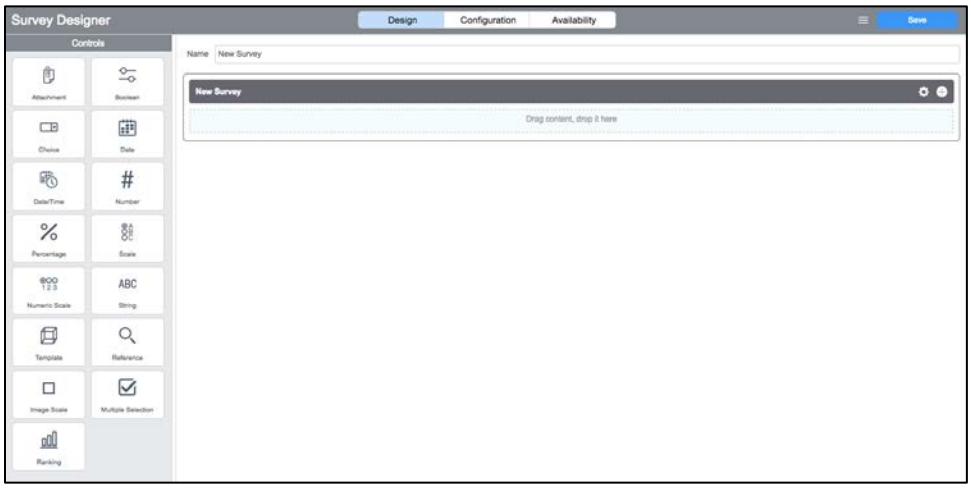
   Name
   Allow anonymous responses
   Send notifications
   Introduction note
   End note

Edit a Survey

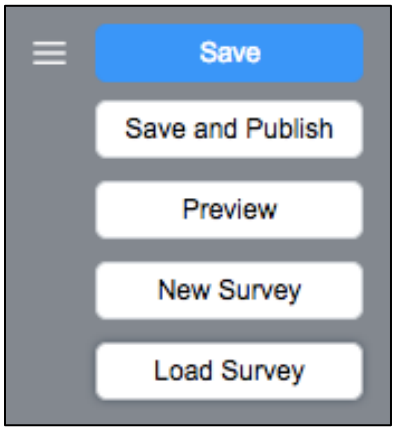
1. Now edit the survey using Survey Designer. Navigate to **Survey -> Survey Designer**.



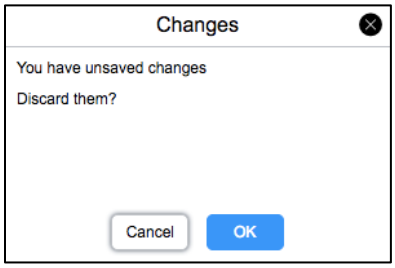
2. A new tab/window opens the Survey Designer.



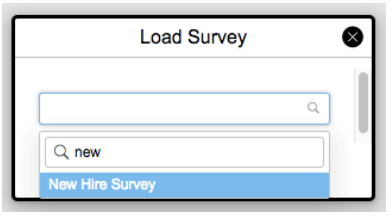
3. Click the **menu** icon and select **Load Survey**.



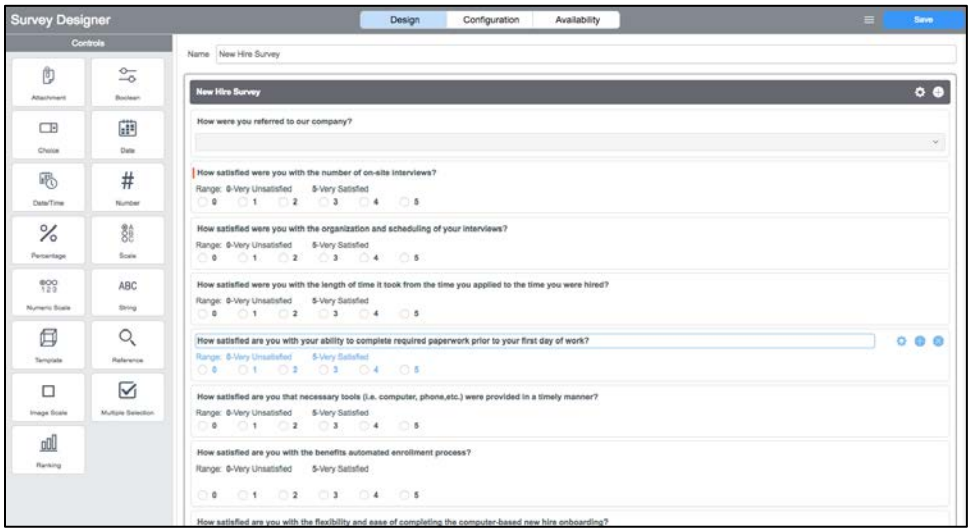
4. A warning message displays. Click **OK**.



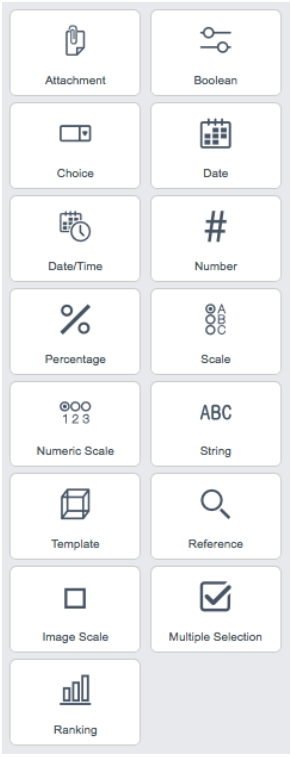
5. Select **New Hire Survey** and click **OK**.



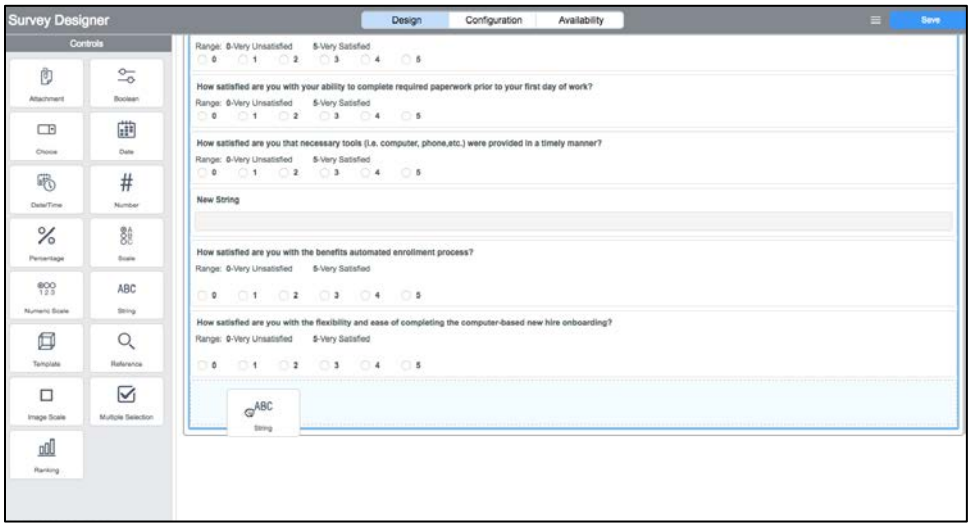
6. The **New Hire Survey** opens for editing.



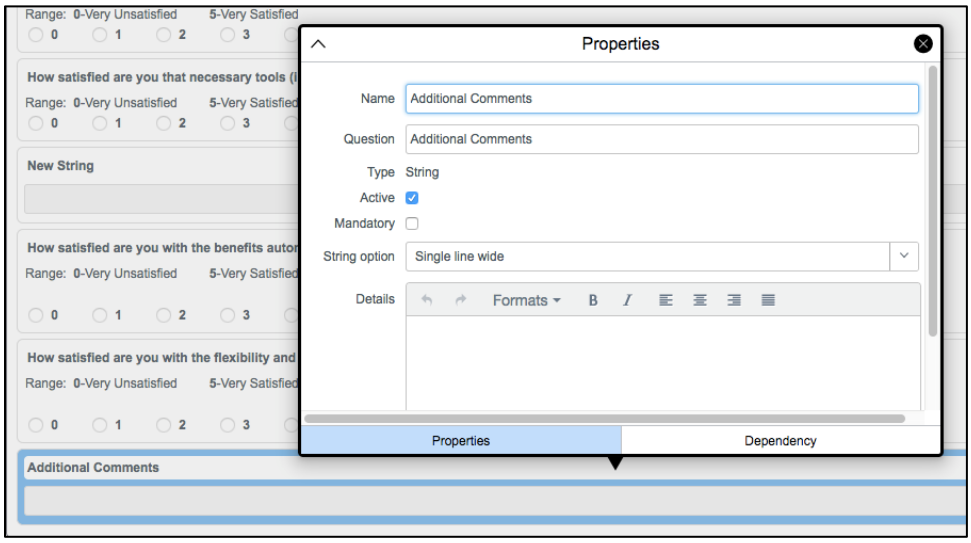
7. Review the questions and feel free to add more questions using the options on the left.



8. Click and drag the **String** type to the bottom of the Survey.



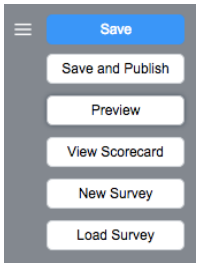
9. Give the new question a label and name of **Additional Comments** as shown below.



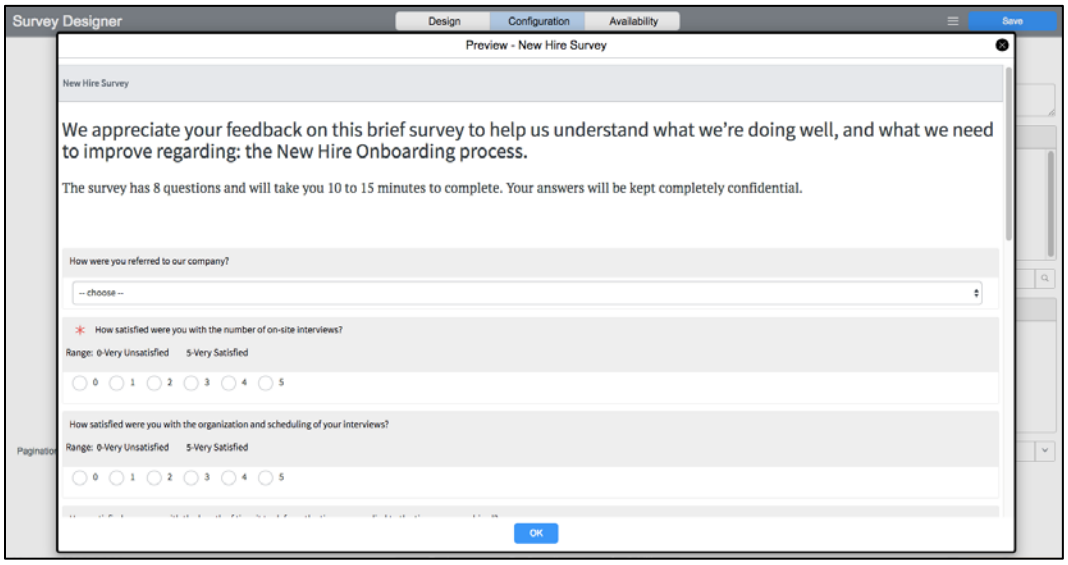
10. Click Save.



11. Click **Save and Publish**, and then **Preview**.



12. A sample view of the survey is presented:



13. Scroll to the bottom to see the Additional Comments question added.

Lab Goal

Lab 4.2 Create a Survey

The objective of this lab is to understand surveys in ServiceNow. The lab explains how to perform the following tasks:

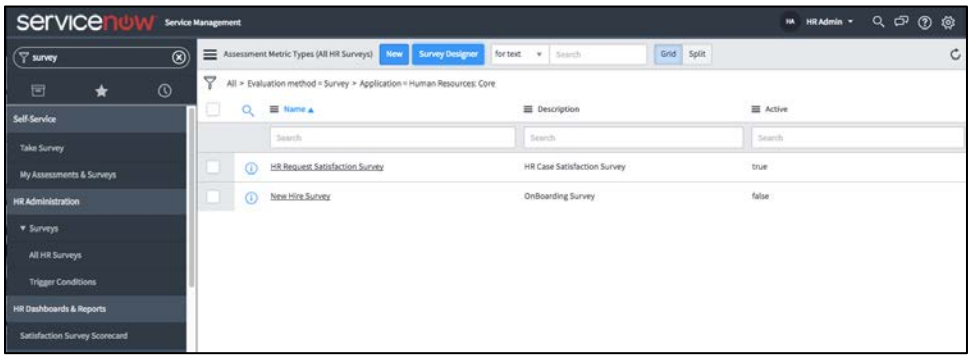
- Assign New Hire Survey
- Publish to HR Portal

Log into the Instance as HR Admin

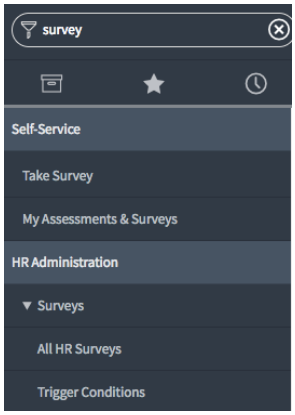
1. Use the following credentials: Username: hr**admin**, Password: hr**admink17**.

Assign New Hire Survey

1. Return to the standard user interface.



2. Search for **survey** in the left navigation pane.



3. Click **All HR Surveys**.

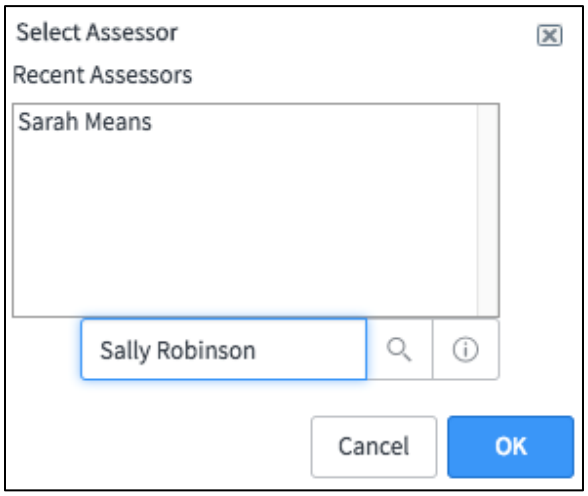
4. Click on **New Hire Survey**.



5. Click Assign Survey.



6. Assign to **Sally Robinson** and click **OK**.



Lab Goal

Lab 4.3 Publish Survey to HR Portal

The objective of this lab is to consume the survey via the HR Portal. The lab explains how to perform the following tasks:

- View survey via HR Portal
- Complete survey
- Review results

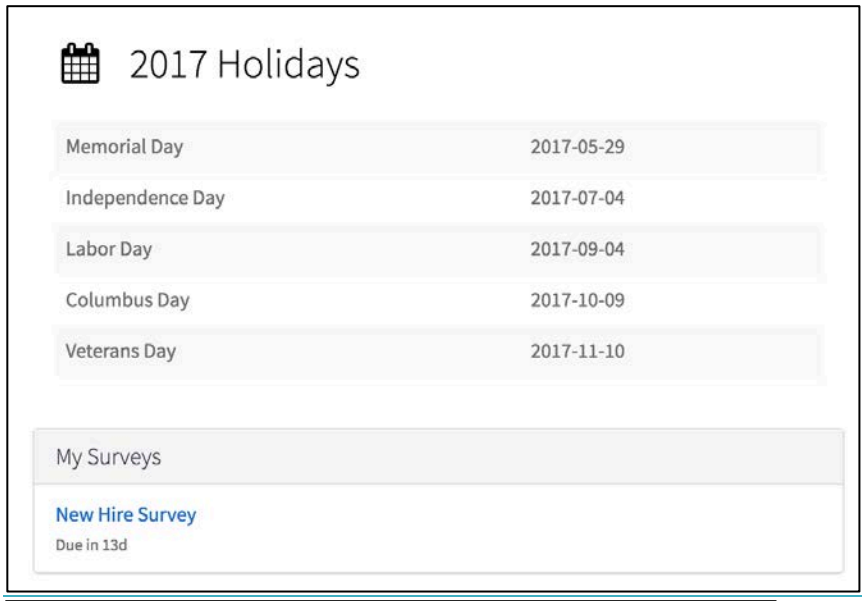
Log into the Instance as Sally

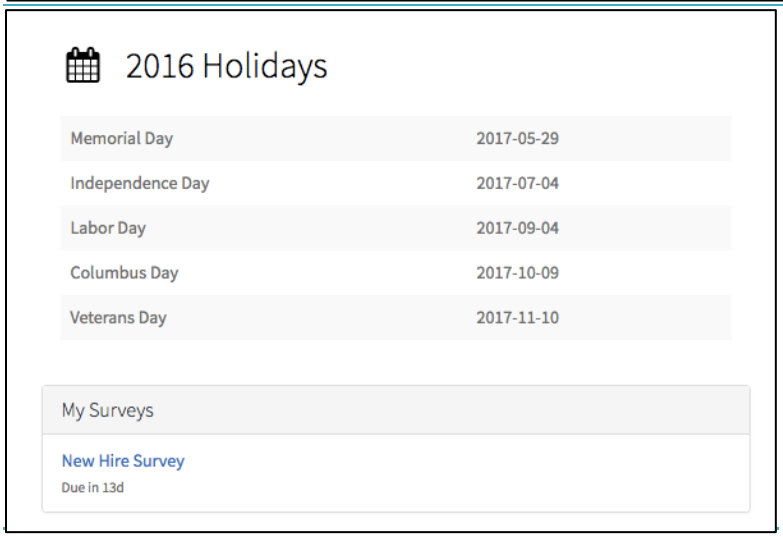
1. Access the instance URL provided at the beginning of the lab.

7. Enter the following at the end of the URL: **/myhr**. The final URL should look something like this: **myinstance.service-now.com/myhr**.

8. Use the following credentials to log on: Username: **sally**, Password: **sallyk17**.

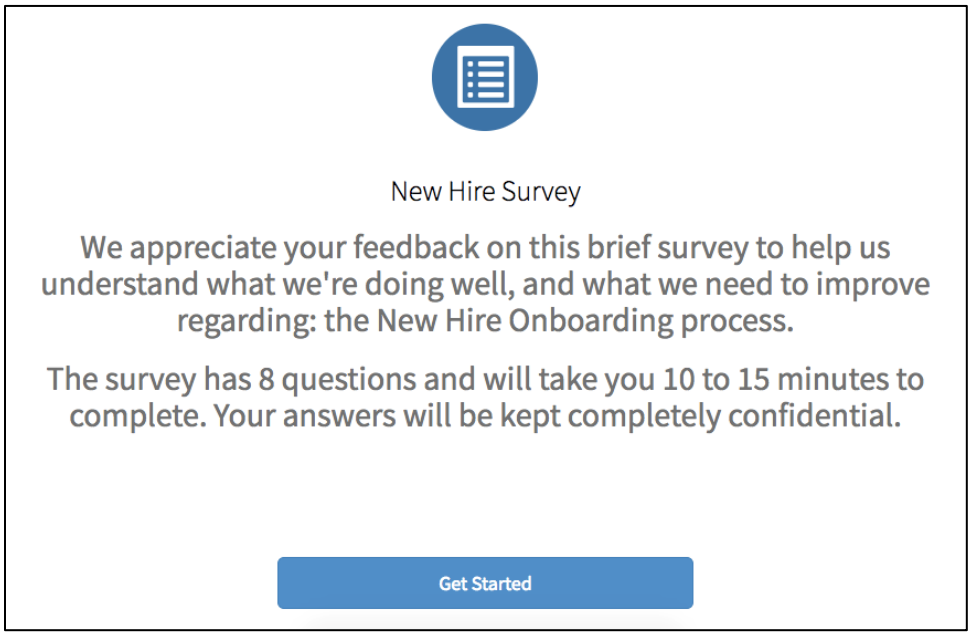
9. You added the My Surveys widget to the HR Portal in an earlier lab. Scroll down to find that widget, There should be a survey ready to complete.





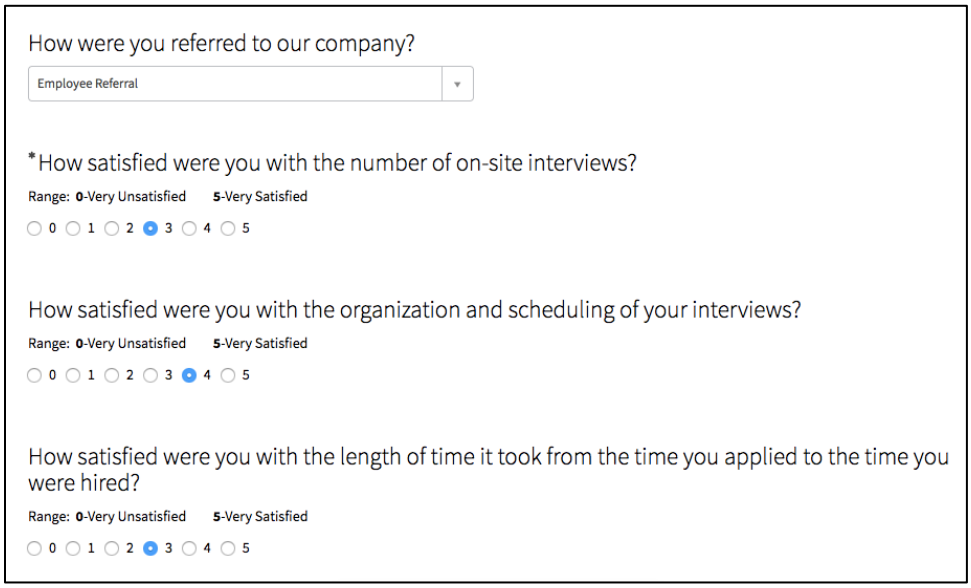
Complete Survey

1. Click the **New Hire Survey** to complete it
2. The welcome note appears.

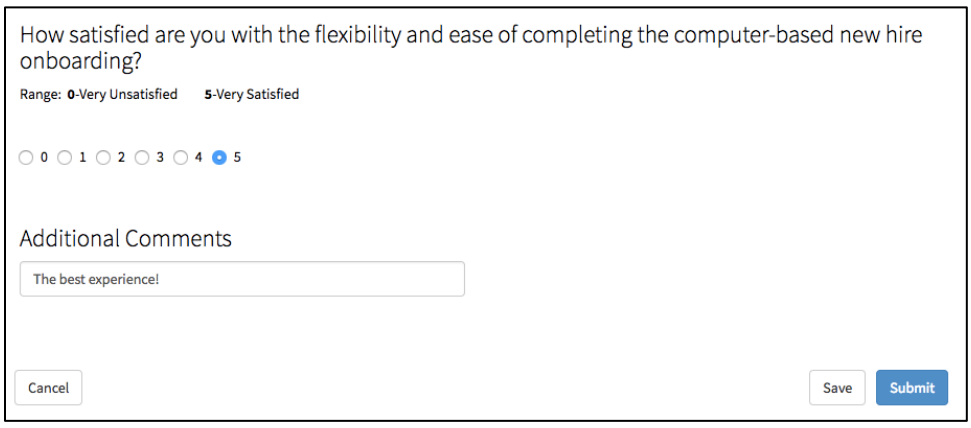


3. Click **Get Started**.

4. Complete the survey.



5. Enter some **Additional Comments** and click **Submit**.



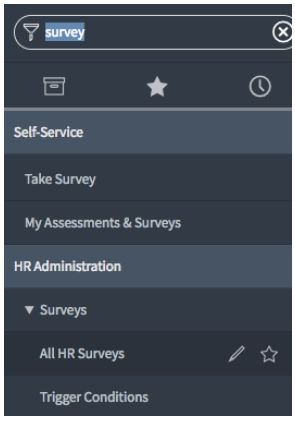
Note: You can choose to save the survey and complete later by clicking the **Save** button.

6. The end note displays.



Review Results from Surveys

1. Return to the standard UI and login with **hradmin** and password **hradmink17**.
2. Navigate to **HR Administration -> All HR Surveys**.



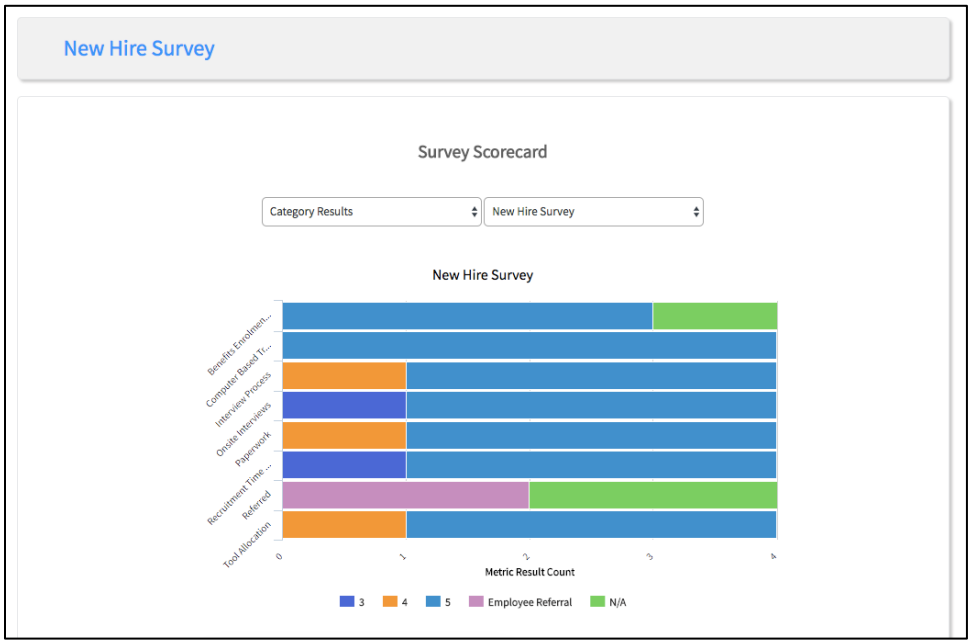
3. Click **New Hire Survey**.



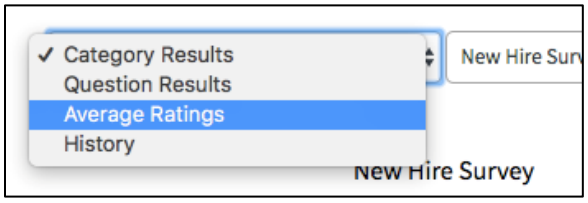
4. Scroll to the bottom of the form and click the **View Scorecard** link.



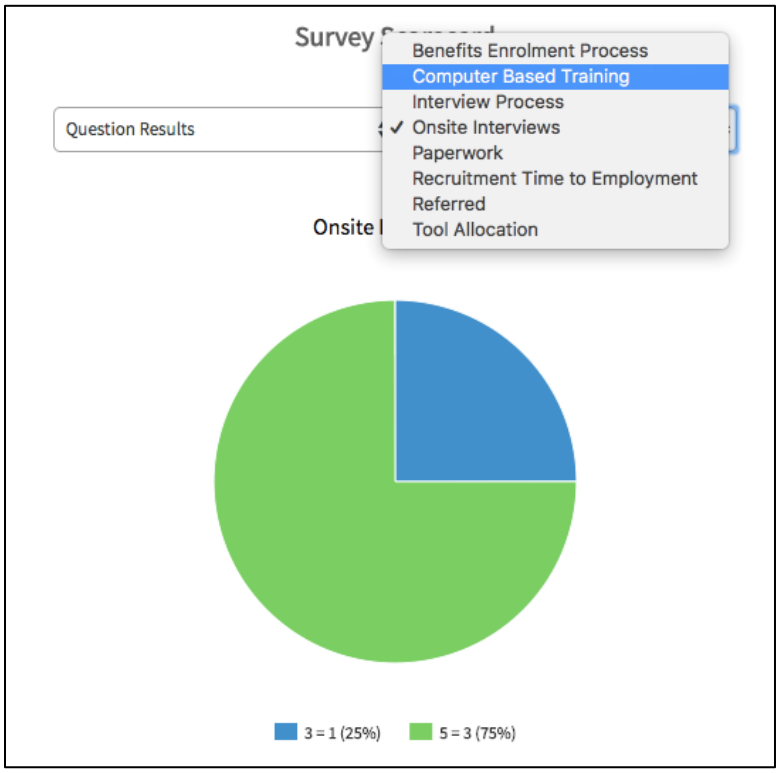
5. This allows the HR team to view the responses from new hires.



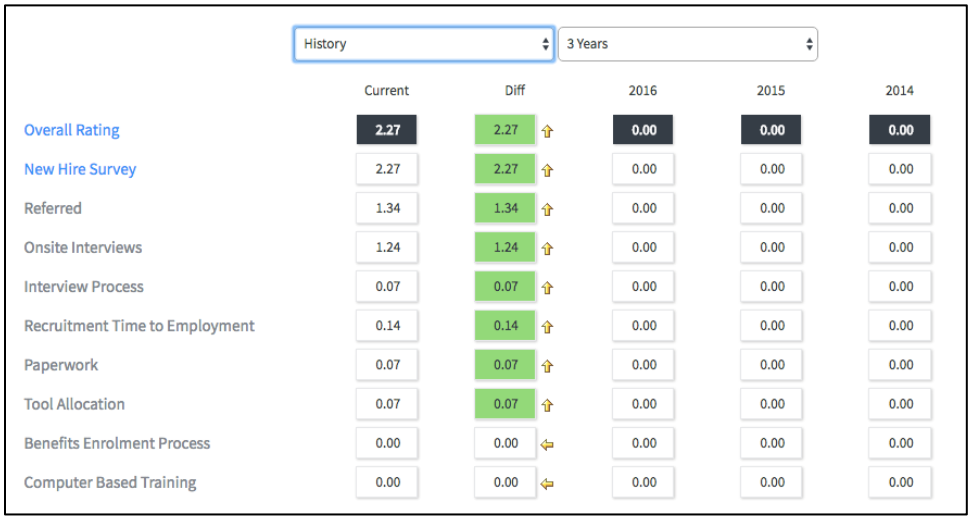
6. You can toggle between the Result types and the report changes.



7. Selecting Question Results provides a different way of viewing responses.

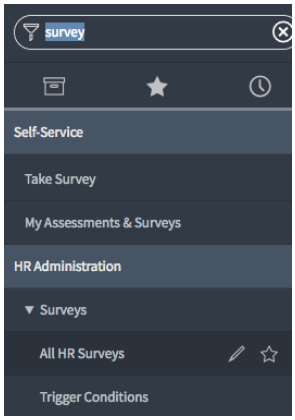


8. Select **History** to show the response trends.



	Current	Diff	2016	2015	2014
Overall Rating	2.27	2.27 ⇧	0.00	0.00	0.00
New Hire Survey	2.27	2.27 ⇧	0.00	0.00	0.00
Referred	1.34	1.34 ⇧	0.00	0.00	0.00
Onsite Interviews	1.24	1.24 ⇧	0.00	0.00	0.00
Interview Process	0.07	0.07 ⇧	0.00	0.00	0.00
Recruitment Time to Employment	0.14	0.14 ⇧	0.00	0.00	0.00
Paperwork	0.07	0.07 ⇧	0.00	0.00	0.00
Tool Allocation	0.07	0.07 ⇧	0.00	0.00	0.00
Benefits Enrolment Process	0.00	0.00 ⇦	0.00	0.00	0.00
Computer Based Training	0.00	0.00 ⇦	0.00	0.00	0.00

9. Navigate to **HR Administration -> All HR Surveys**.



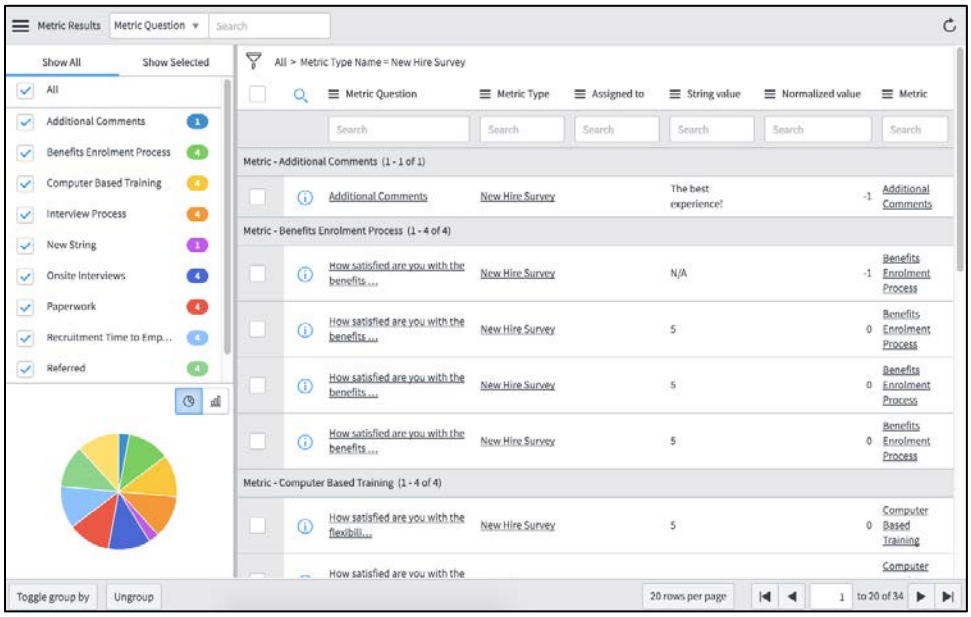
10. Click **New Hire Survey**.



11. Scroll to the bottom of the form and click the **View Responses** link.



12. This allows you to view the actual responses from new hires.



13. Use this information to improve the experience for new hires or any other survey you create to get feedback about performance.

Optional: Lab Goal

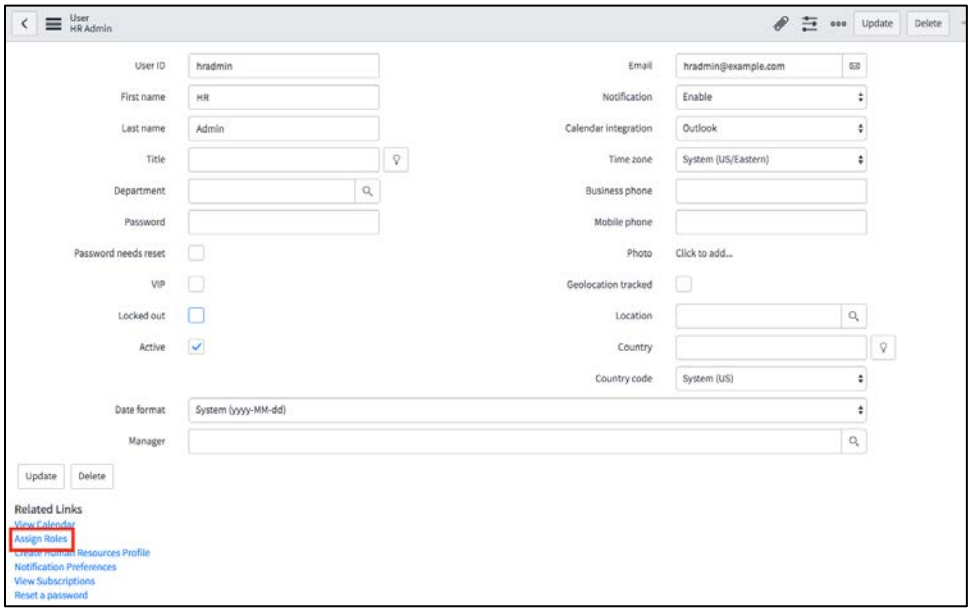
This lab explains how to create and manage HR service inside of ServiceNow. Although we provide many templates out of the box, there may be some services you want to add. This lab explains how to create new services and how to make edits to ones already created.

- Create new services
- Edit existing services

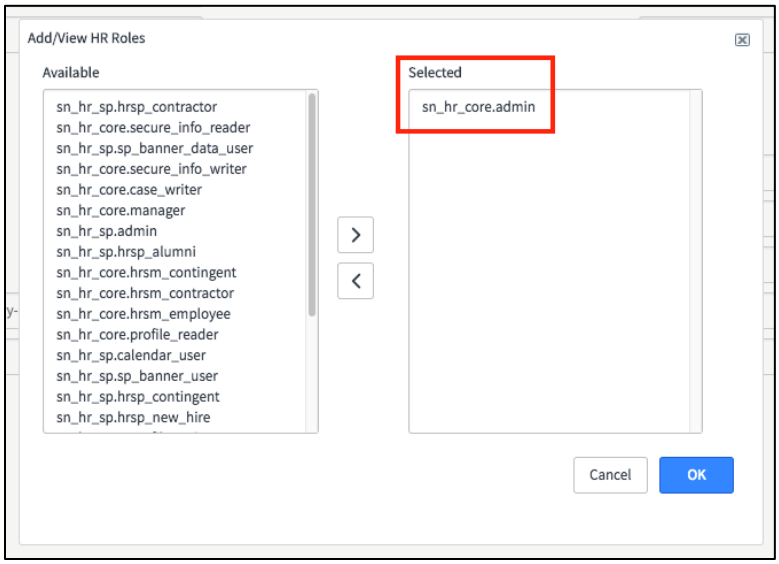
Optional: Lab 5.0 Create a New HR Service

Log into the Instance as HR Admin

1. Use the following credentials to log in: Username: **hradmin**, Password: **hradmink17**.
2. Validate that your admin has the correct roles by moving to your navigation bar and searching **users**.
3. **Search** for the **hradmin** user and find **assign roles** at the bottom of their page.



4. Validate they have the correct role: **sn_hr_core.admin**.

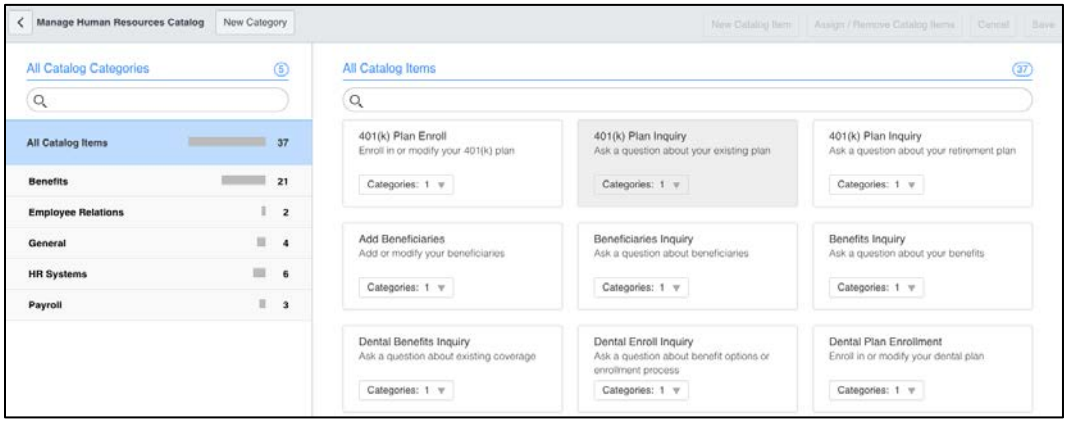


Note: Roles are important for HR because of the way the application is built. To make any changes to the services, HR portal, or other aspects of HR, the user must have access to edit in the HR application and to whatever is needed this role. Notice that you only have access to the HR application, not administrative privileges in other areas. This limitation helps restrict access and gives HR the control to manage access to their application.

5. Click **OK**.

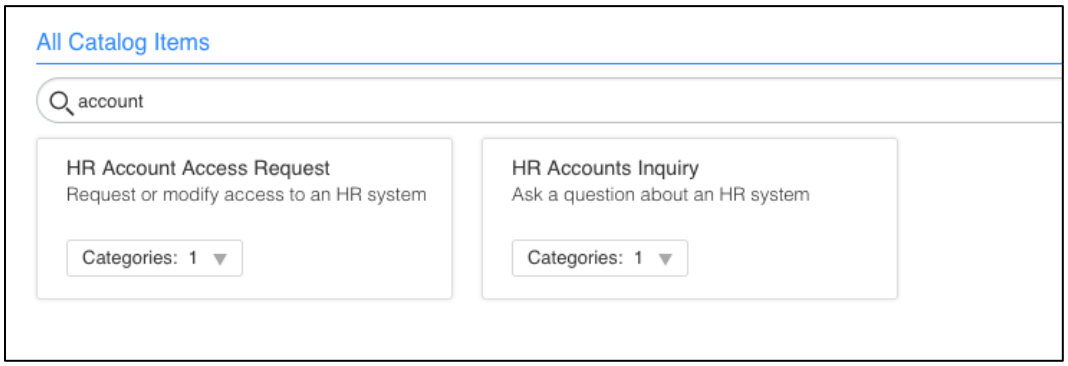
View Existing Services

1. Open navigator and search **manage hr catalog**.



Note: This view shows all services. Active services are white; services that are inactive or "turned off" are shown in gray.

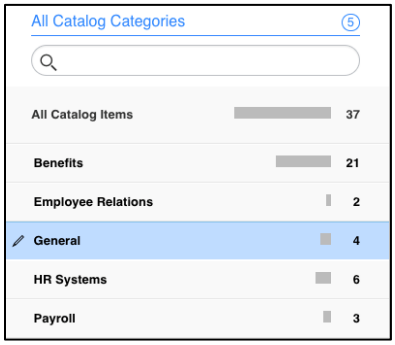
2. Search for **Account.** Currently there are two active services for account questions.



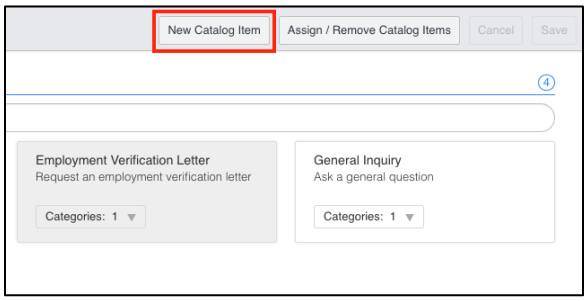
3. From here you can edit the catalog items or turn off any services you do not want to be accessible from the employee perspective.

Create a New Service

1. **Click** the **General** category on the left side.

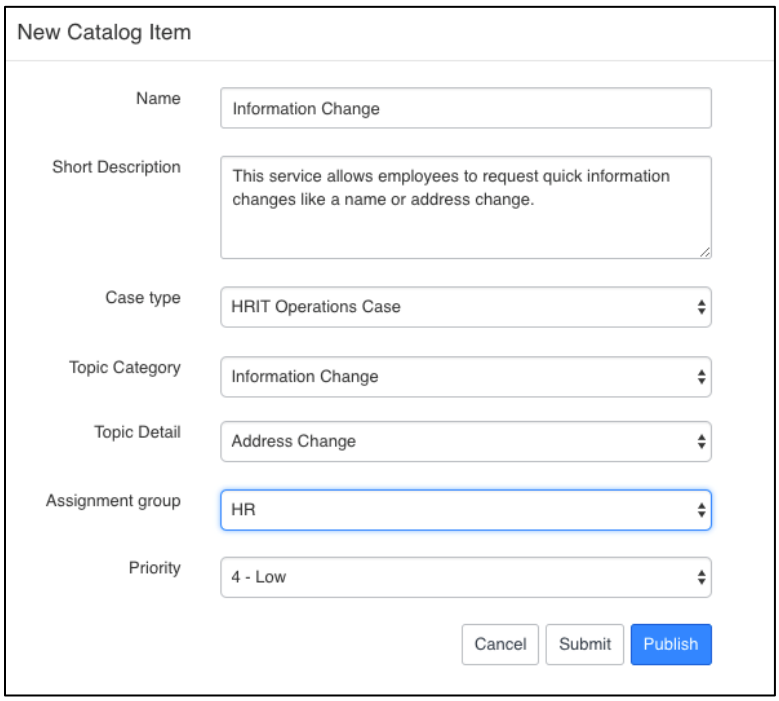


2. Select the **New Catalog Item** button in the upper right.



3. Fill out the following information:

   Name: Information Change
   Short Description: This service allows employees to request quick information changes like a name or address change.
   Case Type: HRIT Operations Case
   Topic Category: Information Change
   Topic Detail: Address Change
   Assignment Group: HR
   Priority: 4-Low

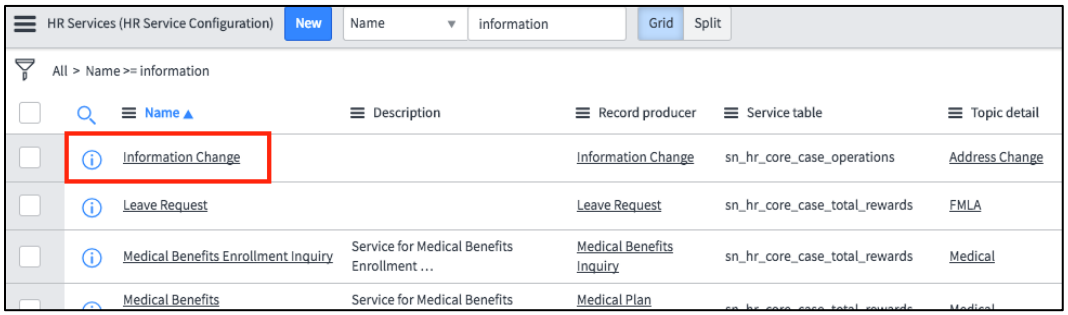


4. Click **Publish**

   Note: Clicking publish now creates a new catalog item, record producer, and HR service for you to manage. This gives HR control over what the employee can see and enter as well as what instructions or skills may be needed for the HR agents.

Build a Service

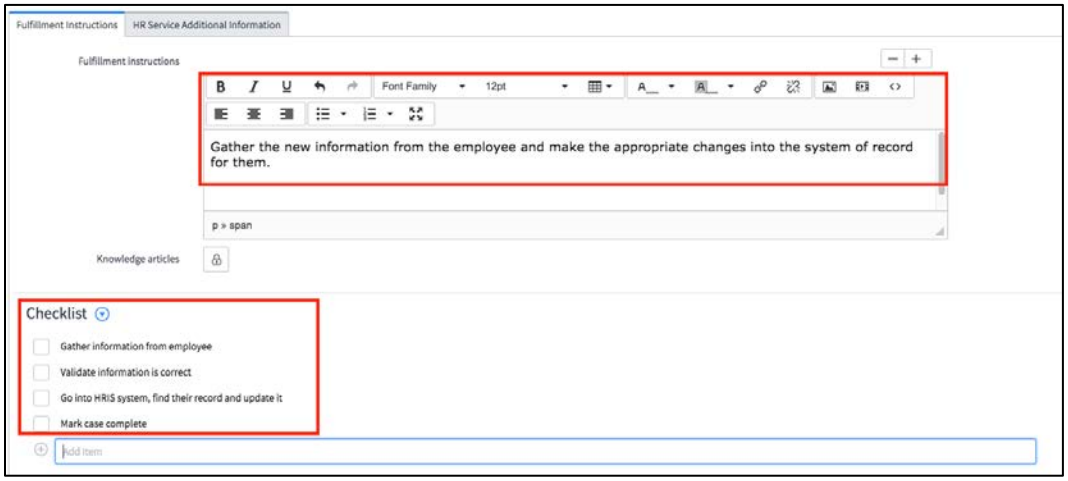
1. Search for **HR Service Configuration** in the navigation bar.
2. Search for **Information Change** service and click into it.



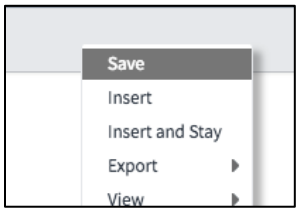
3. Enter the following information:

   Fulfillment instructions: Gather the new information from the employee and make the appropriate changes into the system of record for them.

   Checklist: (Click the arrow > Create New)1. Gather Information from employee 2. Validate information is correct 3. Go into HRIS system, find their record and update it 4. Mark case complete.

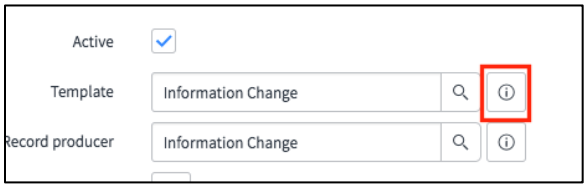


4. Right-click the header and click **Save**.



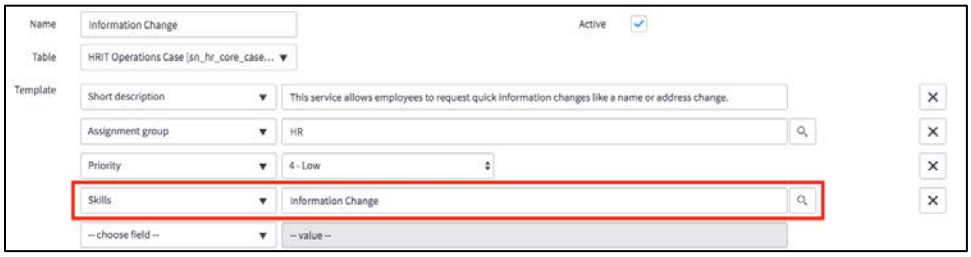
Create a Template

1. Click the **I** icon next to **Template**.



2. Some information should already be included from the initial creation; add the following field:

   Skills: **Information Change**

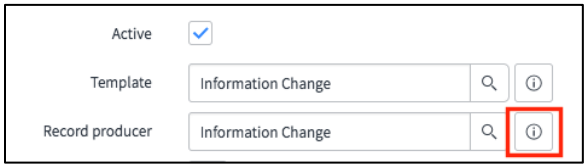


3. Click **Update**.

   Note: This template represents the standard fields and information that get generated every time this type of case comes in. Notice we auto route to HR, and more specifically someone in that group with this skill. Any field on the case table can be templated from here.

Create a Record Producer

1. Click the **I** icon next to **Record Producer**.



Note: A record producer is how you decide what questions employees need to fill out in order to submit this item. How much information from them do you need to complete this request quickly and efficiently?

2. Scroll to the bottom view the list that shows **Variables**.

Note: Variables are the individual questions you ask.

3. Click **New**.

4. Enter the following information:

Mandatory: **Yes**
Order: **100**
Question: **What information do you want to change**
Name: **informationchange**

5. Click **Submit**.

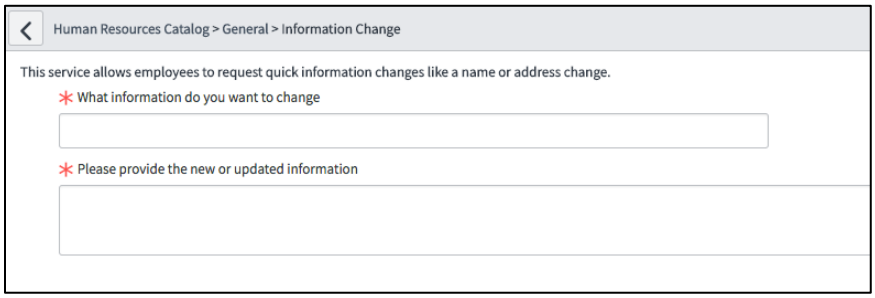
6. Scroll down again and click **New** for a second variable.

7. Enter the following information:

Type: **Multi Line Text**
Mandatory: **Yes**
Order: **200**
Question: **Please provide the new or updated information**
Name: **newinfo**

8. Click **Submit**.

9. Validate the record producer by clicking **Try It**.



10. **Done**! You created a new service available in the service catalog, with basic routing and instructions. To test it further, log in as Sally on the portal and submit an information change request!